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ABSTRACT

This Sourcebook represents a compendium of documents from museum education specialists and volunteer agencies concerned about the training and management of volunteers. The first section of the twelve-part document discusses issues which should be considered prior to initiating or changing a volunteer program. Documents within the section include "Questions to Ask Yourself," "So You Want a Good Volunteer Force," a report on a workshop on volunteer training, and excerpts from Action's National Student Volunteer Program. The sections which follow provide suggestions for using volunteers in various jobs, recruitment techniques, sample contracts, bylaws, training manuals, and application forms. Two model handbooks for volunteers and evaluation methods are also included. A section on legal and political issues discusses insurance, the Virginia State Government Volunteer Act, two articles on the state of volunteerism, and recommendations for providing tax credit to volunteers. The final section contains resources and a bibliography. (KC)

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Volunteers in Museum Education

Sourcebook #2

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George Washington University

Washington, D.C. 20052

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The Center for Museum Education is a clearinghouse which collects, organizes, stores and shares information about the educational efforts or museums of art, science and history, and such similar work by nature centers, parks and zoos. These materials include:

- brochures, announcements and pamphlets produced by museums describing their educational and public programming;
- documents produced for particular museum programs, like teachers' manuals or docent handbooks; and
- published and unpublished papers on museum interpretation and education.

The Center also collects materials on museum education produced by organizations other than museums and information on topics that may be of interest to museum educators, but is produced for other or wider audiences.

The materials in the Center are organized around frequently discussed issues in museum education--volunteerism, audio-visuals or programs designed for high school students, for example.

How can you use the Center? Anyone interested in the educational efforts of museums is invited to use the services of the Center and share their own materials with colleagues. Call (202) 676-6682 or write to the Center for Museum Education, The George Washington University, Washington, D.C. 20052, or visit 2201 G Street, N.W., Suite 429--a direct subway ride from National Airport. The staff will be happy to direct you to information relevant to your particular interest and setting.

The Center publishes an annotated bibliography three times a year in looseleaf form: Information About Information. By subscribing to IAI you will build a desk reference and annotated index to the Center's collections and the museum education field. As materials from your colleagues continue to come into the collection, new annotations in each of the key descriptive categories will be published. Entries include the author and original source and may be ordered from them or the Center.

This sourcebook is one of a series on topics often requested by museum educators. Other sourcebooks include Lifelong Learning/Adult Audiences and Programs for Historic Sites & Houses.

The Center is a way of sharing information with your colleagues. We welcome your contribution of museum education materials and your suggestions about resources that have been useful to you.

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The staff of the Center for Museum Education wishes to thank the many people who have contributed to the preparation of this sourcebook. First among them are Marcella Brenner, director of the Center, and the Advisory Council, chaired by Evan H. Turner.

This sourcebook would not have been possible without the many fine contributions from museum educators around the country. The programs chosen for inclusion in the sourcebook represent a variety of settings and issues; there are many others we omitted with reluctance, in order to retain the balance of settings and practices. However, the substantial number and quality of contributions to the Center's files have enabled us to assemble this sourcebook with a great sense of satisfaction in the generosity of museum educators to their colleagues.

We also thank the Center's intern, Barbara Schiltges, who has done more than her share of volunteering in order to make the sourcebooks a reality, and Grace Stovall and Barbara Moses, themselves volunteers in museum education, who reviewed this sourcebook in its early stages and responded most helpfully.

Thanks also to Peggy Blechman, Marilyn Rosenfeldt and Susan Lehman who helped mightily in the production stages.

Production of this sourcebook was funded by a grant from the Rockefeller Brothers Fund.

--B. C. F.

PREFACE

In the two years since the Center for Museum Education began its work, there have been more requests for information about volunteers than for any other category of museum education work. Many of these questions are comprehensive in character, "Please send me everything you have on docents," for example. Such questions have lead the Center staff to believe that an overview of professional practices in volunteer management and training would be a desirable first step in responding to these inquiries.

This sourcebook, then, is that first step. As you will discover from scanning the annotated index to the Center's files on volunteers, further materials are available; much more needs to be documented and collected. For those readers who are just beginning an association with volunteers, this sourcebook may be an indicator of how other museum educators have accomplished the many tasks required for a successful volunteer program; for other already involved in work with volunteers, it may offer some strategies for ideas for increasing efficiency and communication. Those readers who have established sophisticated programs, and developed considerable skills in working with volunteers may wish to add their materials and advice to the Center's files; those who find themselves overwhelmed by requests for information about their work might wish to use the Center for Museum Education and this sourcebook as a referral to inquiries they no longer have the time to answer in detail.

The inspiration for this sourcebook, and the series that will follow, came from the Advisory Council to the Center, a group of museum and education professionals who have worked tirelessly to increase communication and sharing among museum educators. Their assistance in reviewing materials for the sourcebook has been invaluable.

--BCF

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INTRODUCTION

At the 1978 Annual Meeting of the American Association of Museums there was a panel presentation on the application of human relations processes to museum staff relations. The discussion leader, Dr. Paul Freidman of the University of Kansas, proposed that finding solutions to difficult issues among people who work together consisted of examining how these people handle the stress produced by the issue and how effectively they understand and accept their responsibility for reducing this stress. Using models of conflict, role-played by the panel, he pointed out the universalities of behavior among people who must exercise authority, and people who are subject to authority. In the last minutes of the presentation, someone in the audience proffered the suggestion that, since the discussion had been helpful in providing insights about how to get along with colleagues on the staff, perhaps another session might address the question of how to work with volunteers.

The implication that relations with volunteers differ from relations between others who work in a museum precipitated a lively discussion at the session, and has been in our thoughts while putting together this sourcebook. Behind the implication lie ideas that may be more stereotypical than real, and behind these ideas lies the habit of lumping volunteers together in a group for the sake of convenience, rather than recognizing their individuality. Working with volunteers means establishing relationships with a larger number of people than when working only with staff members, but does not and should not imply a lesser consideration of each individual member of the group. Nor should we assume that, because no paycheck is involved, a volunteer's sense of responsibility or quality of performance is necessarily lessened, or more variable, than that of the paid staff.

Volunteers in museums do receive a kind of reward for which many are willing to exchange their creative abilities and hard work. There are many ingredients to this reward; they include a specialized education, an association with like-minded individuals and the opportunity to act as ambassadors for a cultural movement of great personal significance to the volunteer. At a time when voluntarism is declining in other agencies, (see Legal and Political Notes section of this sourcebook), the museum volunteer still sees the rewards and personal fulfillment of an affiliation with the museum as valuable currency. The feminist movement, far from eradicating voluntarism as some of its early proponents suggested, has identified a woman's right to choose her own lifestyle, and substantial numbers of women choose to volunteer their time to museums with this understanding. Many museums now report that evening and weekend programs are staffed, in part, by women who have careers, and prefer volunteer work in a museum to other leisure-time activities. Men, both working and retired, and younger people of both sexes are also joining the ranks of musem volunteers. In a society that is characterized as "dollar-conscious," the museum still attracts a gift of time from people who might trade it for pay elsewhere.

If the museum's volunteer program is providing a full measure of gratification both in personal fulfillment and in special associations, its rewards are a powerful incentive to good work and cooperation on the part of the volunteer. The loss of these rewards is not something to be taken lightly by the volunteer. Bylaws, contracts and standards, advocated by many museum educators and volunteer coordinators, can be negotiated on these terms: what the museum offers as well as what the volunteer contributes. Recruitment, hiring and firing can proceed just as they do in situations defined by other kinds of currency.

It is inevitable that exceptional situations will develop, confounding codes of behavior and the exercise of authority. It is important to remember that these exceptions also occur in paid positions, where the employee is more powerful, or more determined, than the employer. Individual styles of confrontation are not circumscribed by labels like "volunteer" and "paid staff," and individual challenges to authority require individual solutions, or, occasionally, defy resolution altogether. It is the responsibility of the staff member who coordinates volunteer activities to build into the program the escape valves, like in-service training, open channels of communication, a system for listening to volunteer suggestions as well as grievances, and consistent, positive forms of evaluation that recognize growth in performance skills, so that exceptional confrontations can be identified for what they are.

Many museum educators have found that it is possible to provide a responsive structure for large numbers of volunteers by dividing them into smaller groups, usually people who work on the same day of the week. Because these groups meet more often than the full volunteer organization, each member has the opportunity to be heard and to identify closely with other members. If the staff of the department is large enough, one staff member can be assigned as the leader and advocate for the group. Otherwise, the group can elect one of its members to the role. As long as the expectations of each member, and of the group, are realistically defined and leaders and staff are responsive to these expectations , this is a very effective means of providing communication and upgrading performance. In any volunteer organization, however, the goals must be clearly stated, realistic and acceptable to the volunteer.

Museum people who are enthusiastic about their volunteers' contributions often cite personal style as one of the positive aspects of these contributions. A realistic program, from the start, encourages volunteers to value and to develop a personal approach, and provides initial training and in-service support of personal style rather than a goal of standard achievement. Recruitment and training that suggest absolute standards, in the absence of considerations of individual limitations, become like the mythological bed of Procrustes, whose occupants were either painfully stretched or dismembered in order to fit it. The agony of such accommodation will surely find its way back to the creator of rigid standards.

In this sourcebook we present some contracts, bylaws and standards set out by museums for their volunteers, as well as some training guides, handbooks, services that volunteers perform other than museum teaching, different kinds of evaluation, some personnel techniques that are used in museum volunteer programs. Reviewers of this selection have commented on the specificity of the examples, and cautioned that these examples not be seen as "answers" to all sets of circumstances in all different settings.

One of the joys of collecting materials from museum educators is to discover the endless variation of their responses to issues; there are no universal standard forms or documents, but rather, unique personal adaptations to what may be universal issues. In this spirit we would suggest that each of the contributions to this sourcebook be read as a personal specific adaptation, made with a unique sense of place and possibilities in mind. Let each suggest to the reader the need for a system, rather than a prescription for forms or activities required to develop a system.

--Barbara C. Fertig
July, 1978

SUGGESTIONS ON HOW TO USE THIS SOURCEBOOK

THIS SOURCEBOOK ON VOLUNTEERS IN MUSEUM EDUCATION IS:

. . . a compendium of documents from museum education professionals, volunteer agencies and individuals concerned about the training and management of volunteer forces. While we have organized these materials into categories designed to help the reader sort out the particulars he or she is looking for, the materials complement each other and often overlap, so that the collection represents the basic ingredients in planning for and supporting volunteer services in museum education.

THIS SOURCEBOOK IS NOT:

. . . a manual of interpretive techniques, since this subject merits a complete sourcebook in itself. Nor is it a comprehensive discussion on the use of volunteers in other departments of museums, since the Center for Museum Education collects documents primarily in the interest of museum educators, and primarily from museum educators.

HOW TO USE THIS SOURCEBOOK:

We suggest that you:

1. Read the materials in the sourcebook that pertain to your own interests and needs.

2. Find out if these examples satisfy your needs--apply them to your own work, and decide if they are effective.

3. Contact the Center for Museum Education for further materials, basing your request on those specific needs that were not satisfied by the contents of the sourcebook.

4. Contact the people and agencies listed as resources--they are able to provide services or consulation within their work schedules. Select these resources on the basis of the kinds of services they supply, and the kinds of audiences they serve.

5. Refrain from contacting the individual contributors to this sourcebook, unless they are listed on the resource pages.

These contributors often donate their materials to the Center to relieve their staffs of the burden of responding to individual inquiries. We wish to encourage their efforts to share; not add to their work load.

6. Observe copyright regulations on sourcebook materials. These materials are supplied to you subject to Section 108 of the United State Copyright Code. Please be advised that further reproduction may be subject to the copyright of the author.

7. Send us your own materials. We hope to revise this sourcebook when new and interesting materials become available. You may wish to use the enclosed copy of "Consider this..." as a guide to supplying information on your work. Don't forget, however, to include your own forms of documentation, evaluation, announcements, brochures and handbooks.

THINKING IT THROUGH

The materials in this section raise issues that you may want to consider before starting or changing a volunteer program. Other people's reflections on all of the aspects of volunteering--from goal setting to recruitment to evaluation--may also be helpful in identifying stumbling blocks in existing programs and finding refreshing approaches to get beyond them.

In this section you will find:

--"Questions to Ask Yourself", a research project by students in the George Washington University (Washington, D. C.) Museum Education Program.

--"So You Want A Good Volunteer Force" based on a memo from a volunteer coordinator, Hirshhorn Museum and Sculpture Garden, Washington, D. C.

--the report on a workshop on docent training given by the Museum Education Roundtable, Washington, D. C. and published in Roundtable Reports.

--excerpts from It's Your Move, a publication of ACTION's National Student Volunteer Program

The following material was compiled to complete an assignment for the Master of Arts in Teaching in Museum Education, George Washington University, Washington, D.C., in 1975. In the assignment, students were asked to consider issues involved in docentry/volunteering and give brief examples from museum settings.

QUESTIONS TO ASK YOURSELF

--From a Resource Packet on Volunteers
Seminar Project
MAT in Museum Education Program,
George Washington University, 1975

A. Recruiting

The kind of docent or volunteer you are looking for will in part determine how you recruit. Consider this fact. Many museums feel that large scale newspaper recruiting attracts people who call on impulse and are not likely to stay.

Will you advertise through
- local newspapers
- posters
- flyers
- radio or TV spots
- special events
- local neighborhood organizations
- other volunteers
- college alumni chapters

Will your recruitment notice be specific as to what the training and experience will be?

Many museum docent corps are homogeneous groups of women; others vary in age, background and sex. What kind of volunteer are you looking for--teenager, college student, adult?

* * * * * * * * *

--The Museum of Cultural History at the University of California, Los Angeles trains adults and teenagers recruited from the inner city to give tours of temporary exhibits set up in neighborhood satellite museums.

--The Arizona State Museum, a division of the University of Arizona at Tucson, has 13 college students who are at the museum as part of a work/study plan.

--The Children's Museum in Boston has interns from both colleges and community. In 1974, 7 of the 14 interns were from colleges, the others were from the community. They worked five full days a week receiving minimum wage pay for two days and working as volunteers for the remaining three days. The cost to the museum was $16,800 per year.

--Old Economy Village, Ambridge, PA, has a teenage docent program. They are trained and work on weekends and supplement the adult docent program.

--The Exploratorium in San Francisco employs 16 high school "explainers." They work 10-20 hours per week at $2.00 an hour (after school). Those who work 20 hours receive school credit. College students are trained and paid to work with school groups.

Interviewing docents: a few questions to ask yourself.

How are prospective docents interviewed? Over the phone or in person? Should they observe a tour before they interview, as part of the interview? Who does the interviewing? Staff, other docents, curators? Are you looking for experience and skills, and/or enthusiasm? How will you determine that the interviewee has certain skills?

B. Training

The objectives you want your docents to accomplish at the museum should determine the training they receive. The way you teach them will set an example for their teaching others. Who should conduct docent training?

- education staff
- other in-house staff
- other docents
- outside speakers--specialists

What materials do you provide the trainees?

- museum history
- education department's philosophy
- example tours
- docent handbook with outlined responsibilities
- pamphlets on museum collection
- audio-visual materials and equipment
- school system curricula
- communication skills

How inclusive should the handbook be? When should the handbook be presented? How should it be presented..with a workshop? Is a packet of written information sufficient for dealing with communication skills and problems?

Do the docents pay for their training? How long is the training program? When does it take place? Is it ongoing? What areas are covered or emphasized in training --do they stress content, teaching skills, use of materials, observations, goals and expectations of the program, the program's history?

Will there be required papers, readings, exams, demonstration tours?

Do you provide a docent reference shelf? Who maintains it? Can books be checked out by docents?

When do you use outside experts to train your docents? What areas are important--inquiry techniques, improvisational techniques, new educational techniques, group dynamics? Do you conduct workshops or lectures?

* * * * * * * *

--Fort Worth Art Museum Docent Council
1309 Montgomery St.
Fort Worth, Texas 76107
A year-long training program in art history for docents from three museums--Amon Carter Museum of Western Art, The Fort Worth Art Museum and Kimbell Art Museum. Classes take place in the evening and are open to husbands and auditors from the community. Credit for the course is available through the University of Texas at Arlington. Docents taking the course choose the museum they wish to serve in at the end of the program. Training specific to each of the three museums and their special exhibits is also provided.

--Houston Zoological Garden, Houston, Texas
In addition to training from the zoological garden staff, all docents take a course in communication skills called "Assertiveness Training for Docents" given by the Houston Civil Service Commission.

--Los Angeles Zoo, Los Angeles, California
Experienced docents teach one third of the training classes for new docents.

--National Air and Space Museum, Smithsonian Institution
Docent training is conducted in both day and evening classes, allowing full-time professionals to join the program.

--High Museum of Art, Atlanta, GA
Docents receive their training on the day they are scheduled to give tours at the museum. (i.e. If you give tours on Monday, your training session is also Monday.)

--New Orleans Museum of Art, LA
Docents receive an extensive training handbook--Watermelon. In addition they have a small booklet outlining the program's history. During training docents often receive worksheets which require them to go out into the museum's galleries and complete a series of activities. The worksheets often ask docents to draw from their experience to devise new tour techniques.

C. Evaluation

How will the docents be evaluated?
- by peers
- by education staff
- by tour groups
- by teachers
- by other professionals
- by curatorial staff

Are the criteria for evaluation well known? Will the evaluation be written, verbal, taped or filmed? Will those with poor ratings be given a second chance?

How often will evaluation take place?

D. Program Coordination

Is there a docent council? Who coordinates the docent program? Staff or docent? What are the channels of communication? Should the docents receive some form of reward? If so, what? Should the docents be asked to sign an official agreement or contract?

--The three Fort Worth Art Museums pay for one docent coordinator. The Coordinator is responsible for scheduling tours and docents for all three museums. Docents have no independent organization of their own. They function as unpaid staff members.

--The Wadsworth Atheneum, Hartford, CT
Docents have a docent council with four officers and chairmen. Each works with the docent program coordinator on the staff. There are committees which work on changing exhibition and new tour research, by-laws and scheduling of docents.

SO YOU WANT A GOOD VOLUNTEER FORCE

Tips and things you may already know, in summary form.

--Barbara Edwards Coleson, 1976
Docent Coordinator, Hirshhorn
Museum and Sculpture Garden

(Adapted from a personal communication from Ms. Coleson to fellow graduates from the George Washington University MAT in Museum Education program).

1. KNOW WHY--Establish the purpose and function of the volunteer force. How will they serve the museum and the public? Establish their roles, their relationships, and a channel of communication with several failsafes. It is vital that there be a clear understanding of the objectives of the program on your part, on the part of the museum and among the volunteers so that everyone is playing in the same band, so that the museum will back your efforts and so that you can devote your time to the more creative use of volunteers. You may do this:

a) with guidelines or a charter
 --essentially a constitution and bill or rights,
b) with a contract
 --not necessarily formal but at least written down so that volunteers can understand and accept their committment,
c) with a handbook or manual outlining responsiblities, privileges and processes
 --something that you compile for your own group, set up in the way that you know will work best. You may borrow from other handbooks, but tailor yours to the special needs of your situation.

2. ACKNOWLEDGE THAT YOUR VOLUNTEERS ARE INVALUABLE--Not only do they have special skills, they are dedicated enough to donate them. However, dedication does not make a crack docent force. You have to think about their potential and coordinate their efforts within the museum.

a) Get them acquainted with the rest of the staff
b) Don't let them feel taken for granted.

To underline the respect due to volunteers, arrange for them to meet informally with the staff, circulate information about the services and activities of the volunteers to the paid staff and be sure that the volunteers know about the staff plans that affect their services. Encourage paid staff to join in briefings and in-service training sessions. Offer the services of willing and capable volunteers to staff members who can use them.

3. PROVIDE INCENTIVES FOR VOLUNTEERS TO REMAIN ACTIVE--Be sure that these will hold water for your group. Identify motives and incentives for volunteering among your volunteers. Think over the free resources right on your own staff and inyour collection, and the staff priviledges that might be extended to volunteers. What continuing education programs and special events will interest and hold them? When outlining their services notice how a bit of intelligent wording on your part will change an obligation to a pleasure. Remember that the museum has a big cash investment in trained volunteers. You want to keep them active for a long time.

4. ESTABLISH A FEELING OF PROFESSIONALISM AMONG YOUR VOLUNTEERS--even if they have no intention of moving on to paying jobs. Your attitude and the tools you use can determine this professionalism. These tools are:

a) recruitment
b) requirements for selection
c) training (important, IMPORTANT)
d) organizational structure
e) EVALUATION

5. NO LESS THAN ESSENTIALS--

a) Send for The Volunteer Professional, 888 Seventh Avenue, NYC 10019, one slim buck.
b) Keep a 5" X 8" card on each volunteer, record her talents, concerns, conversations, etc.
c) Enjoy them--They really add a lot of spice, excitement and enthusiasm to a staff--If they don't it's probably your fault.
d) Think in terms of their worlds and interests just as you would do for a visiting audience. It is vital that you understand and respect them, and that they know you do. They should know that you will go to bat for them over a valid request to the rest of the staff--If you won't, they'll go over your head.
e) Create a procedure to allow them to be heard, both pro and con, about their work. Listen to them, work with and for them.
f) Not only should they be evaluated, but they should evaluate you and the museum from their points of view. Do this no less than annually, preferably a month before your annual report is due. Ask them for ideas and attitudes; everyone likes to be consulted, and volunteers are an excellent source of aid--free for the asking.
g) Be sensitive to how they regard you, and spend some time pondering how you can be more effective with them.

ROUNDTABLE REPORTS
Activities of the Museum Education Roundtable
AUGUST 1973

DOCENT TRAINING PROGRAMS

On June 28, thirty staff members and volunteers from museums in the Washington area met at the Folger Shakespeare Library to consider a matter crucial to our work as museum educators–the training of volunteer docents. The occasion was the fifth in a series of workshops sponsored this year by the Museum Education Roundtable. The objective was to develop a model plan for training that could be adapted to a variety of situations. Jane Farmer, Richard Grove and Joan Madden led the three workshop sessions and presented a summary.

As an aid to the discussion, an outline (see end of article) was provided.

Session 1 – "Content"

We first explored ways to help docents gain the command of subject matter they must have in order to be relaxed and flexible teachers. The discussion revealed that most of us follow roughly the same plan for familiarizing docents with exhibit background and content.

We agreed that a good bibliography–preferably approved by a curator and annotated–is essential from the beginning. One local museum gives a bibliography to new docents in the spring when they are interviewed, so they can do their reading over the summer, in preparation for formal training in the fall. Most of the other museums provide a reading list at the start of fall training as a part of a packet of written materials, which may include postcard reproductions of art objects in museum's collection, research papers by staff members or docents, "scripts" outlining tour content, reprints of magazine articles and tips on methodology.

In most Washington museums, two or more weeks of formal training in the fall are followed by periodic brush-up sessions. During the initial training period, new docents are required to observe several "model tours" conducted by education staff members or experienced docents and to attend follow-up discussions. Talks by curators and required reading are also a part of training. Sometimes there are lectures by outside experts.

At the end of the initial training, the docent must give a trial tour under the scrutiny of a staff member or an experienced docent. If her performance is not satisfactory, she is required to polish her presentation skills. Periodic "spot checks" throughout the year reinforce the initial test.

Sesson 2 – Communication Skills

In this session, we explored ways of teaching docents to communicate knowledge effectively to others. Although we all felt training in methodology is extremely important, none of us could suggest a sure-fire way of going about it.

Again the need for a good bibliography was stressed, and several titles were suggested. (See end of article.) We felt that the two bibliographies (content and communication skills) should be provided and that the docent should be required to do approximately the same amount of reading from each.

It was determined that training in methodology usually is more successfully done by education staff members or experienced docents than by outside experts. Experience has shown that docents often have difficulty applying techniques demonstrated by the outsider to the museum situation.

We discussed the use of videotape (VTR) as a means of docent self-evaluation. The docent is taped while giving a tour, and later views her performance, perhaps with the help of a check-sheet. The cost of VTR, prohibitive for many of us, was brought up as a problem; the possibility of developing a program with one of the media centers of the D. C. schools was considered as one solution.

Then this question was raised: How can the average docent, with above-average education and income, be more sensitive to the attitudes and responses of children who are culturally different? After some deliberation, we agreed that if the basic problem of "communication skills" could be solved–if the docent could be taught to be more open and less self-conscious–this difficulty would be greatly reduced. Visits to inner-city classrooms, arranged in advance and conducted without fanfare by one or two docents at a time were suggested.

Session 3 – "The Unpaid Professional"

Does being unpaid preclude professionalism? We decided not. Professionalism–characterized by assured competence–is determined by attitude rather than pay. This concluded, we considered how we could establish and maintain our programs at a professional level.

We first took up the matter of recruitment, affirming that we need to be more persistent in seeking out docents of different ages, sexes and cultural backgrounds. Those of us who might dismiss the possibility of attracting docents from the inner-city as "impractical," were reminded that there are museums which have recruited successfully by going into neighborhoods, knocking on doors and talking to people informally. Advertising is small local newspapers, radio, television and the major newspapers were suggested as other ways of reaching a wider range of potential docents. (Several participants discouraged large-scale media efforts, noting they had learned from experience that widespread publicity may bring in large numbers of prospective docents who come on impulse but fail to stay.)

We discussed techniques of interviewing prospective docents and criteria to be used in selection. A prospective docent should demonstrate an enthusiasm for the museum and an interest in children. There should be no other requirements for her to meet, the imposition of educational prerequisites being unnecessary and restrictive.

Finally, we examined the thorny issue of quality control–How do you fire a docent? We came up with the following plan. During the docent's first year, she is a "provisional docent," who must be asked back in order to remain in the program. From her second year on, she is an "active docent" until she thinks or you think it is time for her to retire, at which point you make her a "docent emeritus," with "special substitute" status, if she wishes. In this way, she can be removed from the program at almost any time without the embarrassment of firing.

Riding the crest of this final accomplishment, we took sherry in hand and ended the meeting, if not with a complete model plan, at least with the satisfying feeling that we had raised, and answered, some important questions.

Ann Bay Smithsonian Institution

"DOCENT TRAINING PROGRAMS" is reproduced from a six-page issue of Roundtable Reports, August 1973. It was a summary report written for the membership of the Museum Education Roundtable (Washington, D.C.) on the fifth in a series of workshops funded by the National Endowment for the Arts.

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OUTLINE

This rather formidable looking outline is really quite simple. It is planned as a guide for today's discussion, presenting questions of interest to museum educators involved in the training of docents. By no means does it cover every area worth consideration; nor are all of its questions of equal weight. We offer it as a beginning, expecting that you will add to it and sometimes take it with a grain of salt. Consider how the questions apply to your particular situation and schedule. Most of them are generally applicable despite the fact that program content varies widely among all of you here today.

From our discussion today, we hope to develop a model plan for docent training programs and present a number of viable alternatives for museum educators developing specific programs.

CONTENT

A. Packet of information for docent -	Possible items to include: Xeroxed pertinent articles, model tour scripts, bibliographies (annotated), pamphlets on museum collection, audio-visual materials and equipment (i.e. slides and pocket viewer), docent research papers, school system curricula? How inclusive should the packet be? When should the packet be presented to the new docent? How should it be presented? (with workshop?)
B. Bibliographies -	Should they be annotated? How long a period is realistic for required reading? Should bibliographies be for reference only? Should they be required? (If required, who pays for books purchased?) Are bibliographies effective in upgrading the level of experienced docent?
C. Docent reference shelf -	Should it include: School curricula and textbooks, object file with information on items in the collection, docent research papers, tour scripts, announcements of related events outside the museum? Who determines what is to be included? Who maintains it? Who pays? Can books be checked out by docents?
D. Lecture(s) with and by staff -	Who? Education staff, curatorial staff, others? How many? How long? How extensive? Before, with or after communication skills?
E. Liason with local college -	Pro's and con's? Who pays?
F. Model Tours -	Who presents them? Education staff, curatorial staff, docents? Why?
G. Evaluation of docent mastery of content	Method: Written, sample tour, oral interview. Evaluator: Education Curator, collection curator, docent chairperson, all of these? Should evaluation be continuing to insure against mis-information? What if prospective docent is unsatisfactory? Should they be able to try again?

COMMUNICATION SKILLS

A. Packet of information for docent (To be combined with content packet?)	Possible items to include: Xeroxed pertinent articles (suggestions?), model tour scripts, bibliographies (annotated), staff/docent written suggestions, information on relating to school children of different ages, abilities and backgrounds, suggestions from school system professionals? How inclusive should the packet be? When should the packet be presented to the new docent? How shold it be presented? (with workshop?) Is a packet of written information sufficient for dealing with communication skills and problems?
B. Outside expert -	Topics: Use of audio-visual materials, sensitivity techniques, group dynamics, inquiry techniques, improvisational techniques, new educational techniques. Who? When, at beginning of docent training, during continuing training? How? Discussion? Lecture? Workshop?
C. Reference Materials (scarce) -	Articles and books for docent reference shelf.
D. Cultural differences -	Discussions among docents. Sensitivity training. Involvement of outside experts.
E. Mock tours and Role-playing -	Is this effective as preparation for child-oriented tour? How: Docent to docent? Docent to staff (education, curatorial, who is authority?) With small group of children as audience? How does video-taping fit in?

THE UNPAID PROFESSIONAL

A. Professionalism -	How can it be achieved? Responsibilities. Quality control.
B. Docent coordinator -	Possible solution to staff-volunteer liason questions. Relationship to staff, both education and curatorial? Paid or volunteer? Selection? By whom? What are the alternatives to a coordinator?
C. Recruitment of docents -	Educational requirements? Do friends work well together as docents? Sources for new docents? Minorities, students, men.
D. Active Docents -	Continuing education tours, lectures, trips, other? Continuing evaluation. How, by whom, when, why? New programs for experienced docents.
E. Evaluation of docent performance -	When? By whom? How can you select out a poor docent?

It's Your Move is a manual for community organizations who wish to work with student volunteers.

The following highlights the volunteer supervisor's responsibilities and is excerpted from the ACTION publication *It's Your Move*. (see Training Section for more information about ACTION.)

APPLICATION

The application form should contain space for vital information such as phone number, address, schedule, past experience and current interests. These forms help the coordinator sort out prospective volunteers (in planning a program) and provide a working index on the volunteer force. Be explicit in titling this form. Is it an "Interest Form," a "Volunteer Application," a "Volunteer Record Card?" If all volunteers will be accepted and there is no real application process, don't call it an application form. Decide exactly what you need to know about a prospective volunteer.

INTERVIEWING

Interview methods vary. They can be one-to-one between volunteer coordinator and applicant, or between supervisor and applicant, or they can be in groups involving several staff members or a few applicants and one or more staff members. They can be exploratory: each decides whether or not there is interest in going further, or selective: the staff person will determine the merits of a prospective volunteer.

Before you arrange for an interview, know why you are having it. Be sure to tell the volunteer what to expect and what, if any, special preparation is needed. Indicate what will happen as a result. Be ready to answer questions on how decisions are reached.

During the interview, make the volunteer as comfortable as possible. Provide ample opportunity for questions about your organization and his or her potential role. Before the interview begins, read the volunteer's application carefully so that you don't ask him to repeat information already furnished. Make yourself a check-list to use during the interview.

- --Attitude and relevant experience.
- --Reasons for volunteering.
- --Expectations--are they realistic.
- --Prior opportunities for exhibiting independent judgment.
- --Willingness to seek advice.

CONTRACT

This non-legal document articulates the expectations of both volunteer and supervisor. It is completed by the volunteer and the supervisor once the volunteer is selected, but prior to the volunteer's actual involvement on the job. It is often part of the orientation process. In many ways it reiterates the job description and might be seen as a final negotiation for that job.

The exact document format depends on your needs. It should, however, contain at a minimum the following items:

- --Volunteer's name, phone number and address
- --Supervisor's name, title, phone number and address
- --Schedule agreed upon by volunteer and supervisor
- --Duties to be performed by volunteer and the objectives to be met in the performance of those duties
- --Nature and schedule of evaluations
- --Instructions regarding missed assignments on given days and general reasons for jestified absence
- --An indication of the volunteer's commitment--how long is he expected to serve.

ORIENTATION

Orientation should provide:

- --A clear idea of the purpose, goals and structure of the organization.
- --A profile of the client(s) served.
- --An outline of the general role of the volunteer within the institution.
- --A chance to answer some questions.
- --A chance for volunteers to get to meet each other and the staff.

The orientation might take place individually or in a group. It might be part of a lengthy interview, or it might be a walk-through of the role. It might be the traditional meeting of new volunteers with their supervisor or volunteer coordinator.

Whether you are working with a group or with individuals, the steps below should lead to an effective orientation:

ASSESS the volunteers' orientation needs. Find out what your prospective volunteers already know about your organization and what they think is important for them to know. If it is not possible to personally question the new volunteers, you might be able to study reports of past orientation sessions to get ideas.

It may also be useful to ask the students to list everything that they want to know before they start on their jobs. The answers will give you items for your orientation agenda. You might ask the same question of staff who will be supervising volunteers. The combined answers produce the priority items for your orientation. Sometimes this needs assessment can be included as part of the orientation itself. Having the group articulate their needs can insure that your orientation is on target.

TRANSLATE the information accumulated from the needs assessment into goals for the orientation. These goals might look something like this:

- --At the end of the orientation, all of the volunteers will have a clear idea of what might happen to them the first day on the job.
- --All the volunteers will know where and to whom they are to report.
- --All volunteers will be able to act in accordance with the published rules for volunteers.

These goals should then be rewritten as precise objectives which indicate the exact ends to be met. For example, a precise objective for the first goal might be the

- --the volunteers will have talked with an experienced volunteer to learn about their first day on the job, and will have voiced their expectations of their first day.

Making the goal into a precise objective enables you to see more clearly exactly what you wish the volunteer to be able to do as a result of orientation.

DETERMINE methods for reaching the goals and objectives. Often we get locked into certain ways of orienting people. Generally we talk at them. A careful look at the objectives may suggest some new approaches. For instance, the goal of "knowing what to expect the first day" might be reached by presenting the volunteers with an essay on a volunteer's first day; by having the volunteers role-play their first day; by listing and discussing the five most likely and five least likely occurrences. You might physically walk the volunteers through the events of the first day. You may be able to come up with many creative and effective activities. Be sure to use varying techniques. Role playing, for example, might be followed by a discussion and question and answer session. Variety assures interest.

DETERMINE the schedule for orientation events. If the schedule of events is too long, consider using different formats--written materials or self-examinations to be completed later.

COMPLETE all the details for orientation. Select staff. Arrange for physical facilities, equipment and refreshments. Duplicate handouts. Make sure that all the people involved in the presentation of the orientation are aware of their roles and the objectives to be accomplished.

INVITE the volunteers. Clearly indicate the purpose of the orientation and state what it will enable them to do. Tell them when and where it will be, as well as approximately how long it will last. Indicate any preparation needed.

CONDUCT the orientation.

EVALUATE the orientation. An orientation, like all aspects of your volunteer program, can be made more effective in the future if you have some idea of how effective it has been in the past. You might have the participants fill out a simple evaluation at the end of the session. Six months later, when they had a chance to reflect on its real usefulness to them, you might have them complete a second evaluation.

Be sure that you involve as many of the pertinent people as possible in the planning and execution of the orientation. These should include experienced volunteers, staff and clients. There should be as many people present as possible to meet the new volunteers and to share with them their perspective. Each should have something to contribute to the goals of the orientation.

(Editor's Query: has any volunteer training program sought to involve the teachers who will be "clients"? Do docents ever meet with teachers and get to know the teachers' expectations of a museum visit before training is over and actual service begins?)

TRAINING

Training may take place before the volunteer begins service, or it may be an on-the-job process. The following steps are involved in the training process:

ASSESS the training needs of the volunteers. Make sure that you aren't training them in something they already know how to do and make sure they have the skills you think they do.

SET your goals for the training. In general terms determine what you want the volunteers to be able to do at the end of the training session.

TRANSLATE your goals into specific learning objectives. These learning objectives indicate what the volunteer will be able to do and how one will know when he has achieved the desired level of learning.

SELECT training methods that can accomplish the objectives. There are numerous books available on training techniques. Again, vary your approach. Consider role playing, buzz sessions, lectures and discussions. Video-tape, if available, can be a very effective tool.

SET a realistic but flexible schedule for the training events.

EVALUATE the training. How many of the participants can actually do what you hoped as a result of the training? How well? Do they perceive that the objectives you set were important? If not, what would have been more appropriate objectives? How do the participants feel about the training experience?

DON'T OVERTRAIN. Sometimes we are tempted to throw in a lot of sophisticated training for a relatively unsophisticated volunteer job. The training you provide sets up expectations on the volunteer's part as to the kind of a role he will play. Make sure your training is appropriate to the volunteer role.

Don't assume that training sessions are the only answer to your volunteers' needs to learn. Consider the other alternatives, including on-the-job training.

SHOW RECOGNITION

All volunteers need to be recognized and thanked for their contributions to the organization of which they are a part. Recognition meets important personal needs and enables the volunteer to document service. Recognition also gives the volunteer an opportunity to contemplate the service given and it enables all of us to point to and remember the joyful aspects of volunteerism.

Giving recognition, however, is not simple. The recognition should be consistent with the volunteer's own values. It should in no way demean or patronize the client. It should be an affirming process, and it should point toward the future as well as praise the past.

Here are some ideas for your consideration:

--Individual thank-you notes from you or from the supervisor who has worked with the volunteer.
--Letters of recommendation for the volunteer's employment file.
--New placements, with greater responsibility.

INEFFECTIVE VOLUNTEERS

Can you "fire" a volunteer?

Yes, but make sure that you make it an affirming, learning situation for the volunteer. You may be in a situation where a volunteer is just not working out, although he is trying his best. Or, you may have a case where the volunteer may be simply not showing up, shirking responsibility, not fulfilling promises. It is important that you let the volunteer know of your concerns about performance, that you suggest areas of change and that you get the volunteer's perspective on the situation. It is important that a volunteer who is not living up to your expectations be able to discuss his feelings and reasons for his behavior. It may be that something in his volunteer experience is causing problems--problems you should know about. Never simply dismiss a volunteer without discussing the reasons for your action. It may be difficult for you, but you owe it to the volunteer (and to the museum - Editor's note) to provide this feedback.

LIABILITY

What about liability and insurance?

This varies from situation to situation. Some organizations have hired volunteers at $1.00 a year to cover them with the organizations's insurance. Others have purchased insurance from one of the national companies that specializes in insuring volunteers. Others simply leave it up to the volunteer to worry about insurance. It is important that you get legal advice on what the liability situation is and that you make clear to your volunteers their responsibilities.

VOLUNTEER COSTS

Doesn't it cost to have volunteers?

The hours volunteers put in are free manhours for your organization. But those hours also demand resources from you. The volunteers need some of your time. They may need supplies to use in their work or need to obtain reimbursement for out-of-pocket expenses. Don't overlook the potential expenses of such a program, and be sure that you budget for them. Just because volunteers work without pay, doesn't mean that they can work without any resources. Be sure that you have the resources to provide them all they need to do a good job.

OPTIONS AND ALTERNATIVES

In some museums, volunteers are used only for instruction in the galleries or exhibit halls. In others a number of options are open to volunteers who wish to serve, but do not care to teach. Some of these options and kinds of alternative services are suggested in the materials that follow.

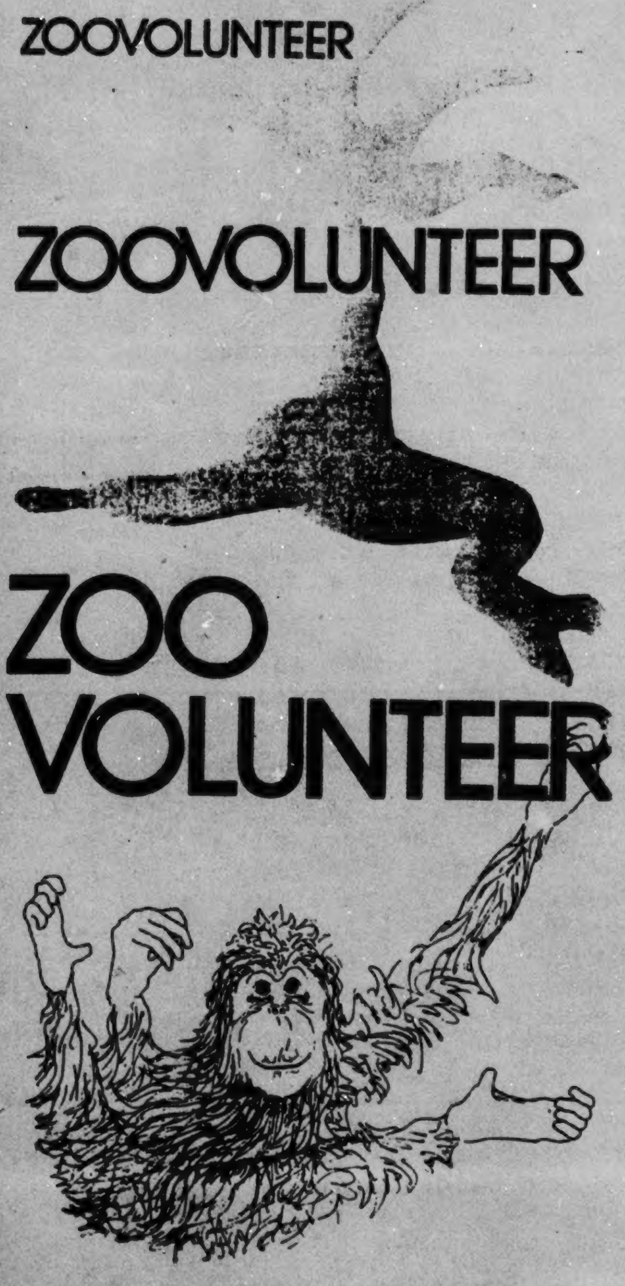
In this section you will find:

- --the National Zoo's opportunities for volunteer service;
- --"Volunteer Visitor Guides"-text from a brochure produced at the Boston (MA) Museum of Science;
- --"Volunteer Opportunities" at Old Economy Village, Ambridge, PA;

There are other alternatives in organizing volunteer services. Some museums have turned to different segments of the population for assistance in carrying out their objectives. Three examples from The Art Museum as Educator are included in this section:

- --"A Good Idea from the Portland Art Museum" in which volunteer guard/guides help "to make the museum and the exhibitions more accessible..."
- --"Teenage Teachers: Explainers in the Exploratorium" in San Francisco, and
- --"The Metropolitan Museum of Art Department of Community Services: Senior Citizen Slide-Lecture Program."

The National Zoological Park, Washington, D.C., has a supporting organization of volunteers know as FONZ (Friends of the National Zoo). The FONZ brochure outlines the variety of ways in which volunteers might become involved in the operations of the Zoo. Note that the brochure seeks to answer some of the practical questions that potential volunteers might have: "What qualifications must I have?" "How much time will my volunteering take?" Zoo volunteer is included here as an example of the services that one organization delegates to volunteers, and also of the medium through which potential volunteers are given the opportunity to match their skills and interests with these services.



The Zoovolunteer

Being a FRIEND OF THE NATIONAL ZOO offers the zoogoer a level of involvement beyond that of the casual visitor.

Our volunteer programs offer something for everyone--young and old, night people and day people. Those who work during the week can participate in evening and weekend programs.

As a volunteer you can become a member of the Zoo family and learn more about the Zoo and its animal collection. Volunteer activities offer you a chance to participate in and support the Zoo's conservation, education, and research programs.

Please note that weather conditions rarely interfere with Zoo volunteer programs. Volunteers are usually at the Zoo whether it is raining or shining, summer or winter.

Please look the programs over. For additional information, call 232-7703, Monday through Friday, 9:00 AM to 5:00 PM.

Thank you!

P.S. All FONZ volunteers are insured by Worker's Compensation Medical Coverage.

Zooguide Program

Volunteer guides take school classes on natural history, zoo geographic, ecology, and animal behavior tours of the animal collection. You can help people learn more about animals!

QUALIFICATIONS to be a guide are an interest in animals, an enjoyment of children, and the ability to walk and talk for an hour and a half.

A guide should be willing to explore in depth the many aspects of natural history and their applicability to the Zoo's animal collection.

TIME COMMITMENTS asked are two school day mornings a week (October through May) from 9:45 AM to 12:45 PM.

TRAINING sessions for new guides are held in the Spring and Fall. Guides must continue their own learning with independent reading. An excellent wildlife library is available in the FONZ office.

Further assistance to this learning process is provided by special behind-the-scenes tours, monthly meetings, group discussions before tours and over lunch, films, Zoo lectures, and other Zoo events.

GUIDING involves giving tours to a group of approximately ten students. New guides begin by giving an introductory mammal tour for 3rd and 4th grade students. Guides progress to touring older students on more specialized topics ranging from endangered species and adaptations to primate behavior.

Junior Member Program

JUNIOR ZOO AIDE

This is a special summer volunteer program that FONZ offers for junior members between the ages of 13 and 16. For the past two summers, junior zoo aides were trained as puppeteers and through the performances of the marionettes, they explained to summer visitors the importance of good zoo manners. However, the Junior Zoo Aide Program is subject to change each year.

In the Spring, junior members receive detailed information about the upcoming program and what is required to participate.

JUNIOR NEWSLETTER

Junior members of any age are encouraged to submit poems, stories, puzzles, and sketches for publication in the FONZ junior newsletter Paw Prints.

Members who are especially interested are invited to volunteer for staff positions. Research, writing assignments, and art projects are assigned to the junior staff member. These assignments are to be completed for inclusion in a future issue of Paw Prints.

Houseguide Program

In the public areas of the animal houses are volunteers who answer questions from the visiting public about the animal collection or the Zoo. House guides also assist teachers on self-guided tours or fill requests for special tours.

QUALIFICATIONS to be a house guide are participation in the Zoo guide program for at least one year plus a keen interest in and expertise on a particular group of animals.

TIME COMMITMENTS asked are two mornings a week, October through May.

TRAINING is initially given in preparation for being a Zoo guide. House guides must have been Zoo guides and will have received the same training opportunities. After at least one year in the guide program and a continuing program of independent study, volunteers have the opportunity to become house guides.

GUIDING in a particular building includes answering questions from the public, giving scheduled tours of the animal house to special groups, and assisting the Zoo staff in observing and reporting on the collection.

Information Program

This is essentially a means of greeting visitors and answering a myriad of questions from Zoo visitors. These volunteers circulate through the Park, rather than staffing an "information desk."

QUALIFICATIONS asked are walking up and down the Zoo's hills, answering questions with a smile, and continuing to smile while being asked:

> Where are the pandas?
> Where are the restrooms?
> How often does the train run?
> Why aren't the white tigers out today?

TIME COMMITMENTS asked are 10:00 AM to 1:00 PM or 1:00 PM to 4:00 PM any number of days a week including weekends from April to September.

TRAINING is given to all participants in a brief course which familiarizes the volunteers with the Zoo and its collection.

INFORMING the public includes walking around the Park, distributing Zoo brochures, and answering questions.

Roving Guide Program

This program is a new approach to providing a wide variety of information and assistance to the zoogoer. Volunteers are given basic training in animal and Zoo information. On a rotating basis, they staff public animal areas and "Zoolab" as well as conduct limited tours for groups.

QUALIFICATIONS include having a weekend day free, an interest in people, and a willingness to learn more about animals.

TIME COMMITMENT is for a Saturday or Sunday from 11:00 AM to 2:00 PM throughout the year.

TRAINING is mandatory for participation in this program. Training sessions will be scheduled for several consecutive weekends.

ROVING GUIDES walk around an area of the Park giving information to the public and conducting limited tours.

Behavior Watch Program

The study of animal behavior is one of the most vital and growing areas of research at the Zoo. In recent years, FONZ volunteers have contributed thousands of hours collecting data on a variety of species from Indian rhinos to kiwis.

QUALIFICATIONS for this program are a willingness to observe an animal on a regular basis for a study that may extend over several months. Reliability is important. Finding substitutes at the last minute is next to impossible, and someone must be there! Self-discipline is critical. A watcher never interacts with the animals, no matter how great the temptation.

TIME COMMITMENTS depend on the specific watch--it may be a one time three hour shift, or it may be a recurring three hour shift once a week for the duration of a watch.

TRAINING classes are given on two consecutive Saturday mornings in the Spring and Fall. Attendance is mandatory for participation in a watch.

BEHAVIOR WATCHERS use a check sheet to record the animals' activities. Meetings are held sporadically to share information about the data collected.

The Boston Museum of Science has produced a colorful brochure (orange ink on yellow paper) that visitors can pick up in the museum. It gives information on how to become a volunteer, and includes qualifications and the museum's expectations for various kinds of services. It is a good example of recruitment literature, but we have chosen to include it here because of the imaginative range of tasks that volunteers can perform in this museum. The colors used on the brochure do not reproduce in black and white, therefore we have retyped the text.

Volunteer Visitor Guides add a personal and friendly touch to a visit to Boston's Museum of Science. They have time to spend with visitors to help them feel comfortable while studying and enjoying the exhibits.

The Visitor Guide Program is a part of the Museum's Education Department, designed to help visitors ro reap more from the exhibit areas. Participants in the program are all ages (14 and above) and both sexes. They ask and answer questions of visitors, interpret exhibits, provide supplemental information, and suggest sources for futher study.

The Guides relate to visitors on a one-to-one basis; they do not give group tours. Rather, they take the initiative to approach puzzled, interested, or distressed individuals, offering information or assistance as required. They keep an eye on the safety of the exhibits and visitors as well, and help out when problems and emergencies occur.

Most Guides work as floaters in the exhibit halls. Those who qualify may become specialists in particular exhibit areas, ready to answer questions about the subject of their particular interest as well as about the Museum and its exhibitis in general. These specialist may give informal gallery talks and mini-demonstrations. Guides sometimes use small pocket props to supplement materials presented in an exhibit or to help illustrate an explanation.

During each guiding session, 10 to 15 Guides are stationed on the exhibit halls where they are easily identified by the bright red lab coats they wear. Badges on these jackets are keyed to signs distributed throughout the Museum to alert visitors to the Guides' presence.

TO QUALIFY YOU MUST:

1. Be committed to working as a volunteer in an informal educational role at the Museum of Science.
2. Have experience, training, or some evidence of the pursuit of a special interest in science.
3. Demonstrate maturity, self confidence, and initiative.

4. Be willing to accept the responsibility of contributing to the program as much as you benefit from it.
5. Have the ability and desire to work with people, including youngsters.

AS A VISITOR GUIDE YOU WILL:

1. Talk with visitors, make them feel welcome, and help them enjoy their visit.
2. Stimulate interest in the exhibits; explain them and show visitors how to use them; answer and ask questions.
3. Handle minor problems of discipline and misuse of exhibits. Get help from the Museum staff for major problems.

WHAT WE OFFER YOU:

1. A chance to expand your understanding of areas of science that particularly interest you.
2. Valuable continuing education and training.
3. Membership in a group of volunteers with diverse interests, and stimulating contact with the Museum staff.

WHAT WE EXPECT;

1. That you make a commitment for one term of the Visitor Guide Program (summer, fall-winter, or spring). A commitment of at least one half-day per week as a Guide, and additional time (about one half-day a week) for continuing education and meetings are also required. In the beginning, there will be training sessions as well.
2. That you learn about the Museum and about specific exhibit areas that interest you.
3. That you take responsibility for your onw continued development and education as a Guide.
4. That you report when you are scheduled, and work out any time conflicts in advance.
5. That you consider yourself part of a project that is evolving, and let us know your suggestions and new ideas.

--For more information, contact
Volunteer Office
Museum of Science, Boston 02114
617/723-2500, ext. 258

Old Economy is a restored 19th century village in western Pennsylvania, built by the Harmony Society. In the manual for volunteers, guides and hostesses, Director Daniel Reibel outlines the variety of education programs, and the training necessary to conduct these. In addition, other kinds of volunteer services are described and the skills and interests that are useful for these services are given to assist the potential volunteer in finding a satisfying niche.

OTHER OPPORTUNITIES

Old Economy Store

For those with a flair for merchandising, the gift shop offers an opportunity to use your talents. The particularly busy time for the store is April through September, but help is always needed.

Kunstfest and Nineteenth Century Christmas

Twice a year the Harmonie Associates sponsor weekend festivals during which the grounds are open to the public and staffed by hosts, hostesses, and craftsmen. Between 200 and 250 volunteers are required to staff each of these two-day festivals. The volunteer opportunities range from a shift as a host or hostess to acting as a craftsman or decorating a building. Old Economy is reinstituting the practice of having apprentice craftsmen during the festivals. The entire corps of volunteers and all their friends are needed to make these events possible.

Museum Open Houses

Sometimes when attendance warrants it, we have an Open House. This means that every building is staffed by trained hostesses and hosts and the visitor wanders at will. Such days include visits of the Gateway Clipper, conventions, and busy Sundays. Being a host or hostess is a good way to acquire confidence in your knowledge of the museum and your ability to handle our visitors.

Special Friends

Old Economy has very special friends it could not do without. They do such things as: loan sheep for the wool program; fix spinning wheels; provide fresh flowers for the buildings; make dried arrangements for the winter; work in the gardens; provide firewood; the list is endless. Each and every person adds something to the composite which is Old Economy.

VOLUNTEER OPPORTUNITIES AT OLD ECONOMY

It would be impossible to offer the added dimension of special programming at Old Economy without the aid of volunteers. In fact, the museum could not handle the regular flow of visitors without the help of a dedicated core of docents. Whatever your interests and talents may be, there is a place for you in activities at Old Economy. The opportunities for volunteer service are outlined below.

Docent

The docent is vital to the museum all during the year. Depending on the time commitment of the docent, she/he can come in on a regular day during the week or the staff will call on the volunteer as the need arises. The particularly frantic months are April, May, and June, when numerous club groups and schools schedule tours. Two or three training opportunities are offered each year.

School Tours

It is anticipated that 25,000-30,000 children will visit Old Economy on scheduled tours during the school year. It is impossible for the elementary age student to relate to the same interpretation as a high school student. In addition, Old Economy has more to offer the student than can be presented in one visit. The goal is to have the student visit the museum three times during his elementary years (kindergarten, second grade, and fifth or sixth grade), plus an additional visit during junior high school. While senior high students do visit the museum, a special program has not yet been developed for this age group.

Old-Fashioned Christmas

For kindergarten during December. This tour is an introduction to the museum. The children are shown three buildings and have a party. (This involves one morning of orientation and one morning of observation in preparation for taking the tour.)

Adventures in Wool

For second grade in March. This tour shows the manufacture of woolen cloth from the live sheep through the weaving process. The tour is given four days a week. It requires attending an orientation, learning to tease and card wool, and several days of observation.

Pioneer Tour

For Cub Scouts, Brownies, and organized elementary age youth groups. This is given all year by volunteers. The tour is one hour long and shows the difference in food preparation between 1830 and now. Tours are generally given late in the day or on Saturday. Regular docents will require an orientation for this tour.

Everyday Life Tour

For fourth, fifth and sixth grades. Given mainly during March, April, and May, although also given throughout the school year. This tour emphasizes the lifestyle which was common in the early nineteenth century. It involves one morning of orientation.

The following three selections are taken from The Art Museum As Educator, edited by Barbara Newsom and Adele Silver, published by the University of California Press at Berkeley, 1977. This report on a national study of art museum education was conducted by the Council on Museums and Education in the Visual Arts. The selections included in this section not only suggest further options in volunteer services, but also two alternative groups--teenagers and senior citizens--from which to recruit museum volunteers.

A Good Idea from the Portland Art Museum

The Portland Art Museum
1219 S.W. Park Avenue
Portland, Oregon 97205

In 1973 the board of trustees of the Portland Art Museum decided to train a group of volunteer guards and got more than it bargained for. The Chamberlains, as they are called, did indeed begin as unpaid guards, but as they pursued their security duties, they began to learn about the museum collections, form study groups, and respond to questions from visitors. By spring 1974 the Chamberlains—about 75 persons, most of them employed in full-time jobs and two-thirds of them active volunteers—had evolved into a group whose primary function was "to make the museum and the exhibits more accessible to the public."*

Each Chamberlain signs up for duty one day a week either on the weekend or a weekday evening after work. Once a month they all meet with the museum director and the education coordinator for required training sessions on the collections and temporary exhibitions. The weekly study groups, which are optional, deal with specific areas of the collections. While they are on duty the Chamberlains sit in the galleries, answer questions, and give short tours.

At first the museum staff was afraid that the regular guards would be hostile to the program, for the Chamberlains have similar duties and are even authorized to open the museum. But when one guard asked a staff member what time the Chamberlains were coming because he wanted to go on his dinner break, the museum knew that these unusual volunteers had been accepted. —*E.S.C.*

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*Information and quotations in this report were drawn from interviews on March 25, 1974, with Polly Eyerly, coordinator of education, and Francis Newton, director, Portland Art Museum.

THE METROPOLITAN MUSEUM OF ART DEPARTMENT OF COMMUNITY PROGRAMS: SENIOR CITIZEN SLIDE-LECTURE PROGRAM

Metropolitan Museum of Art
1000 Fifth Avenue
New York, New York 10028

A happy congruence of needs—those of a senior citizen volunteer group to find work for its clients and a museum to supply the demand from senior citizen centers for "art appreciation" lectures—produced this response to a special audience. The program's major problem is tricky slide projectors; its major rewards, a service to the elderly community and the satisfaction and sense of purpose it gives the volunteers. CMEVA interviews and observations: January–March 1974.

Some Facts About the Program

Title: Senior Citizen Slide-Lecture Program.

Audience: Members of New York City senior citizen centers who request the service, as well as the senior citizen volunteer lecturers themselves (there were 53 in 1974). Although they have a range of backgrounds, the volunteers tend to be upper middle class, white, female, Jewish; many are retired schoolteachers.

Objective: To bring some of the Metropolitan Museum's resources to senior citizens unable or unwilling to come to the museum and to involve the volunteers in a useful and revitalizing activity that draws on their experience and background as senior members of the community.

Funding: About $3,500 annually, almost entirely from the operating budget of the museum's department of community programs. This department is financed entirely by the National Endowment for the Arts and the New York State Council on the Arts.

Staff: One coordinator and one instructor, assisted by the staff of the museum's photography and slide library.

Location: Training for volunteers takes place in the museum; lectures are given in senior citizen centers throughout New York City.

Time: September–June; the program averages one lecture every other day, booked two to three months in advance.

Information and documentation available from the institution: None.

In January 1973 the Metropolitan Museum began a program in which senior citizen volunteers are trained to give lectures to their peers in New York City senior citizen centers. The most noticeable result of this program has been the involvement and enthusiasm that have developed in the senior volunteers as a result of their responsibilities.

Birth of the program

In its first five years of operation, the Metropolitan Museum's department of community programs learned a good deal about the resentment that communities can often feel toward high-powered culture brokers who try to forcefeed "high art" to those designated needy of it. The department's most successful and long-lived programs have been those initiated not by the museum but by the community itself and designed around community-defined needs. Many of the department's activities are simple get-togethers at the museum to help various local interest groups learn about museum resources that may be useful to them.

The senior volunteers lecture program is an example of a community-initiated program. It is the result of the happy merging of two needs; one was the demand from senior citizen centers for lecture programs; the other was a request from the Retired Senior Volunteer Program (RSVP) to the Metropolitan for work that senior citizen volunteers might do. The solution to both requests became apparent to the community programs staff, and the program was on its way.

Training and recruitment

Before volunteers can become lecturers, they must meet weekly for ten to twelve weeks for basic instruction in the principles and history of art by art historian and sculptor Robert Friedman. At the same time, the volunteers are introduced to the Metropolitan's collections and taught techniques of lecturing, the operation of the slide projector, and the use of the museum's slide library. Before the training session is completed, each volunteer gives a ten-minute lecture to the other trainees. There is no pass or fail system, but those volunteers who cannot meet the demands of the training period also generally lose the desire for the job and drop out of the program.

After the training period, there is a graduation ceremony in which the volunteers receive a certificate designating them qualified community lecturers. They also receive a museum identification card that entitles them to regular staff privileges, such as museum restaurant and bookstore discounts.

Between January 1973 and March 1974 there were three training sessions, which graduated 53 senior volunteer lecturers. The primary sources for participants have been RSVP, word of mouth, a July 1973 article in *New York* magazine, and the National Retired Teachers Association of the American Association of Retired Persons. This last organization has produced the largest number of senior volunteers and, because of the backgrounds of its members, has sent those individuals best equipped to function as public lecturers.

Who the senior volunteers are

The majority of the volunteers are upper middle class, white, female, and Jewish—although this description is far from inclusive. The spread of personalities and abilities within the group is wide: some volunteers have difficulty following the art historical training lecturers, whereas others are able to break into the lectures with additional pertinent information when an area in which they are knowledgeable is being discussed. One confessed that although he loves telling the stories of pictures, he has no understanding of the "art part" and has picked up the "isms" from an art book of his daughter's.[1] Many of the lecturers are retired schoolteachers who traveled widely during summer vacations and now use this experience to advantage. One woman regularly includes in her Gauguin lectures slides she took in Paris and Tahiti.

The lectures: topics and format

Most of the senior volunteers stick closely to the basic information they were given in the training sessions. They say that their favorite subjects are van Gogh, Gauguin, Toulouse-Lautrec, and Chagall. As they become more experienced, the volunteers are encouraged to branch out in the exploration of new topics, and many of them do, adding such subjects as Chinese, early Mesopotamian, and Egyptian art; Flemish and Dutch painters; fashion in art; the "Ash Can" school; and African art. Although some lecturers develop expertise in a single area, others are able to talk on a variety of subjects. One volunteer gives thematic talks—the nude, hats, animals, flowers—and prepares a new one virtually every time she speaks.

The volunteers' lecturing techniques vary as widely as the lecture topics, but the basic format is a seven- to ten-minute talk followed by a slide show. Some volunteers are highly "audience conscious," able to adapt a single lecture to various groups. When speaking about Chagall to a Jewish group, one lecturer stresses the Jewish symbolism and representations of ghetto life in his paintings; this same lecture before a Puerto Rican group becomes the story of a poor boy who made good. Some volunteers divide their lectures into distinct units and place accompanying slides in three separate trays so that the talk can be cut short if the audience starts to fidget, or certain points expanded on if they arouse special interest. This flexibility is valuable, say the lecturers who use it: people in a nursing home are usually not interested in the same things as are those bustling around the Central Presbyterian Church.

Other volunteers emphasize content rather than presentation in their lectures and like to think of themselves as experts in a given specialty. One volunteer says she has read the entire Bible so that she can answer questions about the discrepancies between science and religion that are provoked by her archaeological talks. If some of this lecturer's scholarly interests are lost on her audience, another lecturer is able to keep his audience actively involved with speculations about why some of Leonardo's paintings are unfinished, the creative impulses of Marc Chagall, the undue credit de Gaulle received for the liberation of Paris, and blind fish that inhabit caves.

The senior citizen audience

Card-playing and dancing are favorite activities in New York's senior citizen centers; cultural programs usually run a poor third in popularity, say some observers, functioning chiefly to give the "fun" activities respectability and legiti-

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macy. Nevertheless, arts and crafts classes are well-attended in the centers, so the volunteers, at this writing, were planning a series of craft-oriented lectures to be given together with studio classes conducted by Elder Craftsmen, Inc.

If audiences do not always share the senior volunteers' enthusiasm for art, they are usually responsive to the fact that the program is being presented by one of their peers. Post-lecture questions as often revolve around the senior volunteer program itself as around the art the volunteers present. After one lecture four members of an audience of fewer than thirty asked for the name and phone number at the Metropolitan to call about a volunteer job.

Problems

Volunteers and museum staff agree that the program's biggest problems are getting and organizing the slides and operating often recalcitrant projectors. The Metropolitan slide library has been an important partner in the program's success: each month 600 or more additional slides are in circulation as a result of this program, all of which have to be reserved, charged out, returned, and refiled. When several borrowers are using slides from the same period, there is competition for basic material. Accustomed to serving a professional public, the library has had to adapt its procedures to these new borrowers. Slide librarians have found the senior volunteers eager and conscientious in the preparation of their lectures, but inclined to forgetfulness afterward. Some volunteers are uneasy about asking necessary questions that have been asked before; others ask too many questions. To help ease the way for the volunteers, the slide library staff has prepared mimeographed sheets on the use of the library and the operation of projectors. Published slide sets with scripts have also been helpful to volunteers so that they do not always have to depend on their own initiative and organization of complicated material.

Operating the projectors is another problem. Outwardly simple, they can be tricky and obstinate. In the middle of one lecture a volunteer looked down at her projector and exclaimed, "It's going by itself! Why is it going by itself? I can't talk that fast! What am I going to do?" Somehow the button on the Carousel projector had switched to automatic, and the lecture was thrown into five minutes of chaos before the error could be corrected. Another lecturer consistently projected all his slides either upside down or sideways. Often the senior citizen centers do not have the proper equipment, so the Metropolitan has tried to solve the projector problem by sending a department member to the lecture with a projector from the museum and asking him to run the machine and help with mechanical problems as they arise.

Scheduling

Lectures are given every other day on the average—the heaviest schedule the department feels it can handle. Because of an announcement that has gone to most senior citizen centers, the demand is heavy, and lectures are scheduled two to three months in advance. Although volunteers were at first apprehensive about moving around the city, they now serve senior citizen organizations in all New York neighborhoods, from Park Avenue to Bedford-Stuyvesant to Flushing.

Senior citizen centers in New York are notorious for their disorganization. In one case a bingo game was scheduled at the same time as the lecture; in another, it was a doctor's visit. In addition, audiences are not always told about an upcoming lecture, or the room is not set up in time or cannot be darkened or lacks a screen.

When these things happen, volunteers feel their program is just part of the center's "busy work" rather than an important activity. To make the lectures mean more to the centers, the museum has considered instituting a small charge. It has also planned a luncheon at the Metropolitan for directors of the centers and the volunteers, both as an orientation to opportunities for senior citizens in the Metropolitan and as a forum where volunteers and directors can share their needs and problems.

To safeguard lecturers against such day-to-day difficulties as strange neighborhoods and runaway projectors, senior volunteers usually travel in pairs, one as the lecturer and the other as the backup person. Training staff emphasize that every plan should have an alternate: thus, lecturers who plan to have a projector sent from the Metropolitan often bring their own as well.

When one lecturer discovered all his slides were projecting wrong way up, his partner came forward and gave a short talk until everything could be straightened out. Senior volunteers travel in pairs, too, because they like to keep abreast of each other's lectures. Two women, one of whom talks on Egypt and the other on Mesopotamia, attend each other's lectures so they can maintain a running debate on which civilization invented writing.

To help the senior volunteers move ahead in their knowledge of the field and the techniques of lecturing, the department in 1974 instituted bimonthly meetings. In the morning there is an art lecture and in the afternoon the volunteers meet with a museum staff member to plan and schedule the coming lectures, discuss problems, and share experiences and ideas. In a recent session one volunteer, an actress, spoke to the group about eye contact and voice projection.

Other activities

In their visits the senior volunteers have discovered that their audiences hardly knew the Metropolitan Museum existed. Although the lecture program was originally designed to reach audiences neither mobile enough to travel to the museum nor hardy enough to make their way through its long corridors, increased attempts have been made to encourage follow-up visits to the museum. By spring 1974 one museum tour had been given to senior citizens by the volunteers, and others were planned.

The senior volunteers, some of whom come to the museum several days a week, are active in the museum in other ways, too. They visit exhibitions, partly to help prepare their lectures; attend gallery talks and auditorium events; help with paper work in the community programs office. Two volunteers spend one day a week filing slides for the slide library.

A big annual event is the Senior Citizens' Holiday Party, now staged mostly by the volunteers themselves, which takes place in December in the Metropolitan's Medieval Sculpture Hall around the museum's Christmas tree. The 1973 party featured a concert by the Sirovich Senior Center Orchestra and a welcome for the nearly 400 guests by the museum's director, Thomas Hoving. To accommodate an impossibly large potential audience in the fairest way, the museum sends invitations to senior citizen centers on a rotating basis. But so socially prestigious has the event become in the senior citizen community that political pressure has been exerted for an invitation.

Funding

Almost all senior citizen activities at the Metropolitan are paid for out of the operating budget of the department of community programs; those funds, in turn, come from the National Endowment for the Arts and the New York State Council on the Arts, not the museum. Expenses for the program run about $3,500 annually, including the party, which got extra funds from the New York Telephone Company in 1973.

What the program means to volunteers

To judge from their bright eyes and eager interest, senior volunteers are well served by the program. As the slide lectures are an open-ended activity, preparation of a talk can become an all-consuming occupation. One volunteer speaks of the heavy load of free time she was faced with before she came to work at the museum. Another tells of friends who upon retirement have simply dropped dead because they have no interest to replace their jobs.

The volunteers seem to find their new roles at the Metropolitan exciting and useful. The nature of the Metropolitan Museum itself is a factor here. Intimate association with a prestigious public institution is a source of pride to the volunteers and an affirmation of their worth to society. Small touches— the official I.D. cards and behind-the-scenes visits to places like the Arms and Armour workshop—are important psychologically in the success of the program.

Few of the volunteers had any background in art before coming to the Metropolitan. One signed up for the program in the belief that it was a course in photography, but she has stayed on to become deeply involved in her museum activities. A woman who had been an accountant helps senior citizens in another program fill out their tax forms; for her, both programs have similar meaning. It would seem that it is not a love of art that has created the bubbling enthusiasm of these senior citizens, but rather the new focus the program has given their lives. One volunteer speaks eloquently about the vast resource of experience and expertise that senior citizens represent. The Metropolitan Museum is starting to tap this resource.—*F.G.O.*

TEENAGE TEACHERS: EXPLAINERS IN THE EXPLORATORIUM

The Exploratorium
3601 Lyon Street
San Francisco, California 94123

High school students answer visitors' questions and explain perceptual phenomena in this museum where science is joined with visual art. Along the way, the Explainers gain confidence and sometimes new direction; they also offer one model for out-of-school learning, applicable to museums anywhere. CMEVA interviews and observations: April and May 1972; December 1973; June 1974.

Some Facts About the Program

Title: The Explainer Program.
Audience: 60 high school students and 12 college students per year.
Objective: To prepare students to explain exhibits to visitors and schoolchildren and to serve as museum floor staff in place of guards or tour guides.
Funding: Annual cost is approximately $50,000. Program is funded by the National Endowment for the Arts, with a matching grant from the Rockefeller Brothers Fund. Some College Explainers are supported by a work-study program, some receive institution support.
Staff: Museum staff hires the students and provides an eight-hour orientation preceding their first day of work. Ten Explainers work full-time (20 hours per week), 10 work part-time (8 hours per week, on weekends). Students generally may work no more than two four-month terms.
Location: In the Exploratorium.
Time: The museum is open to the public from 1 P.M. to 5 P.M., Wednesday through Sunday. Program began in 1969.
Information and documentation available from the institution: Mimeographed handout.

More like a warehouse or an airplane hangar than a museum, the building that houses the Exploratorium has been used as a garage for Army trucks, a telephone book distribution office, a Fire Department headquarters, and the site of 18 indoor tennis courts. It was originally built by architect Bernard Maybeck for the 1915 Panama-Pacific International Exposition, and the exterior still looks like a "ruin" made for a movie set.[1]

Completely reconstructed in 1965, the building—the Palace of Fine Arts in San Francisco—is now the home of one of the most unusual museums in the United States. Its three acres of space under high vaulting roofs were transformed in 1966 into a "museum," a title that founder and director Frank Oppenheimer immediately qualifies: "When we used the words science museum, nobody liked the word *museum*, because it had a passive content for some people . . . [so] we invented the word 'Exploratorium.'"[2]

The Exploratorium is one of the least passive museums ever invented; it is full of exhibits that visitors are urged to handle, to "discover" for themselves—many of the exhibits require visitor manipulation and participation in order to reveal their mysteries. But most visitors need help, and signs stuck around the vast cavernous interior offer it: "If you have any questions, ask a Red Jacket." Teenage boys and girls wearing red jackets are Explainers, high school students hired and trained by the Exploratorium to act as guides. They constitute the entire floor staff of the "museum." Instead of conducting tours, they wander through the hall or station themselves at particular exhibits, answering some questions and asking others, striking up conversations with visitors and encouraging them to try out one or another of the 300 exhibits. (For a report on the Exploratorium's education program for elementary schoolchildren, see chapter 6.)

How Explainers are chosen

The Explainer program is arranged, at the Exploratorium's request, by the job counselors of high schools throughout San Francisco. Students chosen for the program work four hours a day, five days a week—three school afternoons and both weekend afternoons. The museum is open to the public from 1 to 5 Wednesday through Sunday, so these "full-time" Explainers are there whenever the museum is open. For their 20-hour week, they receive academic credit and $2.25 an hour. "Part-time" students work only on weekends, earning the same pay scale for their eight hours of work. There are usually eleven full-timers and ten part-timers during each four-month period; five of them are hired for a second term to serve as a nucleus for the new group, and sixteen new Explainers are chosen each term from approximately fifty applicants.

Students are selected through interviews by the museum staff. The staff does not search for students with scientific talents or ambitions. What it looks for, says Oppenheimer, is students' reactions to exhibits and an ability to articulate this reaction. The capacity to learn, and to keep on learning, is crucial for an Explainer. An Exploratorium bulletin emphasizes the need for this basic curiosity:

> We feel that the Explainer job is more enjoyable than [many] other jobs possible for high school students. At the same time it is more demanding, and, when hiring students, one must keep this in mind. We have also found that student interest is usually initially keen, but that it wanes and must be constantly re-stimulated. However, the returns do exceed the investment. The job is quite definitely educational and, as such, its utility to the Explainer is limited only by the extent of his or her curiosity.[3]

The training program

The premise of this "quite definitely educational program" is one all teachers appreciate: you learn a subject well when you try to teach it.

This was precisely what Oppenheimer had in mind when he invented the Explainer idea. He said of it,

> [The idea] grew out of seeing demonstrators at other museums, for example, the Paris Museum. But one of the things that everybody knows is true is that you begin to learn when you start to teach, and normally that is hard to do in the classroom. It is hard to get the students to do the teaching. But here there is very much this process of learning and teaching. We teach the Explainers a great deal, and they learn on the floor, but they are immediately translating what they have learned into teaching it to a different audience. And so, it is the best as-you-learn teaching situation that I have seen.

And the students have a lot to learn, as most of them enter the program without much science background and need instruction about the exhibits and the purposes of the Exploratorium. One 17-year-old Explainer told a *Newsweek* reporter, "I never took very much science, but I'm learning a lot. I didn't even know what a laser was until I started working here and people asked me about it."[4] Another, whose talents are more musical than scientific, said of his Exploratorium experience, "This place has changed my whole way of thinking about how the world is." From still another, "Everybody always says that they learn more about people than science. For me . . . it's been the other way around."

Each new group of Explainers receives an eight-hour orientation to the museum and its exhibits during the two weekends before they begin work. Once they have started their jobs, the students continue to get hour-and-a-half lectures on Saturdays and Sundays before the museum opens; almost all of the lectures use the exhibits as props. Explainers are also encouraged to keep notebooks on visitors' questions and to talk with each other as part of their Exploratorium education. This "learn while you earn" technique, the staff believes, allows each student to proceed at his own pace and to acquire some understanding of the exhibits by actually handling them. "Furthermore," says the bulletin, "the Explainers are encouraged to think on their feet and to make educated conjectures if they do not know the exact answer to a visitor's question. This approach encourages visitors to do the same and that is, after all, what we're all about."[5]

The point of hiring students with no special knowledge or interest and teaching them to "teach" is also the point that Oppenheimer wants to make with as broad an audience as possible: that the barriers separating ordinary people from science can be broken down. He is entirely satisfied to trust visitors to use their own senses to learn something about science—and he trusts the Explainers and the visitors they talk with to exchange ideas. "The approach works both ways; often the visitors enjoy instructing the Explainers and equally often the visitors feel that young people can understand this material better than older people."[6] Some observers suggest that adult visitors feel more comfortable talking with high school students than with expert adults who might be amused by their lack of knowledge about basic scientific concepts.

For some, the beginning of a career

Most of the Explainers began not only with little or no background in science but also with no thought of working in a museum. More than half come from minority-group families—Chinese, black, and Chicano—and the group is consistently divided equally each term between males and females. Although their stay at the Exploratorium is, say staff members, "too brief to make young scientists of them all, it does open their eyes and interest them enough to bring families and friends from all locations and strata of San Francisco society."[7]

Several Explainers, even so, have been inspired by their experience not only to go on with school but to pursue new fields of study. The staff estimates that about 10 percent of the Explainers, some of whom might not have gone on to college at all, have taken up technical subjects or the arts, decisions that are directly attributable to their experience at the Exploratorium.

Just as important to the Exploratorium staff is the "visible growth in self-confidence and maturity of these teenagers, who often were hesitant to walk up to strangers and offer to help with complicated scientific apparatus."[8] At the end of his tour at the Exploratorium, one Explainer wrote, "I know I've been here a long time (almost ten months), but as I look back, it's gone quickly. I've learned about lasers, holograms, defraction, refraction, the right hand rule . . . light, and to blow glass. I've learned more about people, how to deal with them and approach them and I've also among the rest of this learned more about myself." According to their parents and teachers, said Oppenheimer, many of the students had been drifting before they came to the Exploratorium. He is proud that the work there has given them new direction.

Costs and spinoffs

The Explainer program has been operating since 1969. Its current annual cost is about $50,000, paid by the National Endowment for the Arts with a matching grant from the Rockefeller Brothers Fund. This total cost of $50,000 includes the wages of the Explainers and the salary of their instructor-supervisor. In effect, this sum constitutes the Exploratorium's guard costs, for the presence of the Explainers on the floor obviates the necessity of hiring paid guards. Oppenheimer estimates that at least eight would be needed, at an annual cost of about $38,000—without any of the benefits to the visitors, the students, or the community provided by the Explainer program.

In addition to the Explainer program, with the help of grants from the National Science Foundation the Exploratorium hires four to six high school students each summer to help construct and repair exhibits and conduct experiments. These students are not part of the Explainer program but are hired as apprentices and assistants and bring scientific talent and knowledge to their work at the Exploratorium. Some install their projects for visitors to handle and for the Explainers to help with, but others do their own demonstrations for the public.

Together the Explainers and the specially talented students form an unusual group of "teachers" in an unusual "museum."—*A. Z. S.*

RECRUITMENT

How to attract volunteers--and whom to attract--to your program is often a matter of recruitment strategy. Long before the strategy is planned, however, the education staff and the museum administration need to determine the reasons for having volunteers. If volunteers are wanted to implement a program that the museum believes is an important one, then recruitment should be directed at people who possess the qualifications or background that will make the program run well. On the other hand, if your museum encourages volunteer participation in order to forge stronger links with the community, then recruitment materials will want to convey a welcoming image to many kinds of people, and would be distributed in a more general manner than with the former goal in mind. And if your recruitment efforts fail to attract the kinds of volunteers you seek, you might consider changing the emphasis of your volunteer program in order to use to the best advantage the kinds of volunteers who have sought you.

In this section you will find:

--the (Washington, D.C.) National Portrait Gallery's modest, but effective notice, placed annually in "Ann's Readers' Exchange" in the Washington Post, along with the letter sent by the Docent Coordinator to the newspaper, asking that the notice be printed;

--a selection from Volunteer Administration, Fall 1977, in which members of the education staff of the Minnesota Science Museum (St. Paul), present the idea of tailoring the volunteer program to the community's resourceful people (see periodical section);

--a tip passed on by Norma Selvidge, excerpted from "Marketing Volunteering" published in Volunteer Administration, Winter 1978 (see periodical section);

--an imaginative flyer from the Akron Art Institute (Ohio);

--a flyer from the Loch Haven Art Center (Florida), listing options for volunteer service.

August 30, 1977

Anne's Readers Exchange
Washington Post
1150 15th Street, N.W.
Washington, D.C. 20005

Dear Anne:

In the past, your column has been helpful in putting us in touch with individuals who might be interested in volunteering their services at the National Portrait Gallery.

We are now looking for new volunteers, and I wonder if you can help us again, by including the enclosed announcement in one of your columns before September 15, 1977.

If you can supply any additional information I hope you will let me know. Thank you very much.

Sincerely,

Docent Coordinator
Office of Education

COPY FOR PUBLICATION

The National Portrait Gallery (Smithsonian Institution) is seeking volunteers to help with its educational programs for elementary-age children and adults. Volunteers visit local classrooms to make presentations on American history and art and conduct student and adult tours at the Gallery. No teaching experience is required, but an interest in young people and ability to travel to schools in the Washington metropolitan area are important. An introductory meeting will be held at the National Portrait Gallery on Thursday, September 15, 1977 at 10:00 a.m. to explain the details of the program. Training sessions for new volunteers will take place on Tuesdays and Thursdays in September and October. For additional information call Leni Buff at the National Portrait Gallery, 381-6347.

The Minnesota Museum of Science has developed a new approach to volunteer recruitment and service. In excerpts from an article published in Volunteer Administration, (Fall, 1977) Carla McGray and Nancy Johnson Hall present this new approach.

How To Make A Museum Volunteer Out Of Anyone

By Nancy Johnston Hall
and Karla McGray

WANTED: VOLUNTEERS FOR SCIENCE MUSEUM
(FOR EVERY KIND OF JOB IMAGINABLE).
ANYONE AND EVERYONE QUALIFIED.
THOSE INTERESTED PLEASE APPLY

This ad could easily have been written by The Science Museum of Minnesota (SMM), an institution dedicated to the premise that anyone has a valuable talent or ability useful to the Museum.

The Science Museum of Minnesota is currently dispelling the myth that the typical volunteer is the white, middle aged woman with school age or grown children, and extra time on her hands. Karla McGray, Coordinator of Human Resources of SMM, is looking for ways to involve any member of the community in the Museum's program -- people who might even be surprised themselves to discover there is a place for them at the Museum.

There are several reasons why this approach is a natural and necessary one for SMM. The Museum is in the process of a major expansion program. This expansion includes a domed Omnitheater and three floors of exhibit hall space connected by a skyway to the present Museum in St. Paul.

In an effort to make this new facility a "people" museum (as opposed to an electro-mechanical museum), involve the community at a maximum level and provide interpreters for the increased Museum program space, the natural solution was a full scope volunteer program (or "human resources" program as SMM has chosen to call it). In making the decision to add this human dimension to all Museum programs and exhibits, the SMM staff has designed the entire Museum with a strong emphasis on participatory activities which can be enriched by volunteer individuals. In this way the volunteer program is an integral part of the overall interpretive design of the new facility.

This humanistic approach pervades the whole Museum in several ways. "Man" is the theme which will unify the three sciences represented -- the physical, cultural and biological. Each of the three floors will explore one aspect of man. The first floor deals with man's own perceptions of himself and the physical world, the second with man as a cultural being, and the third with man as a living animal.

Therefore, any subject which deals with Man is appropriate for study in the Museum. As a consequence, a volunteer with almost any area of interest can fit into this far-reaching program. A volunteer need not have a science background nor an academic background to feel comfortable with his or her own contribution.

Nancy Johnston Hall is a Science Writer at The Science Museum of Minnesota; and, Karla McGray is a Staff Writer at The Science Museum of Minnesota.

The Museum will be seeking many levels of volunteers. A very important group will be the interpreters and demonstrators who will assist the visitors in adding depth to their museum experience. These volunteers will dramatize, and personalize Museum programs. In addition to interpreters and demonstrators, the Museum will be using maintenance volunteers - individuals who will virtually help to keep the Museum running. The biology labs will need animal and insect caretakers, plant growers and even beekeepers. Volunteers with mechanical and electrical abilities will assist in keeping exhibits in good operating order and contribute their expertise in alternative ways of planning exhibits.

Those volunteers with expertise in specialized areas may be used as volunteer trainers. Volunteers with educational backgrounds may provide in-service workshops on communication skills and learning theories. A specialist from the Heart Association might train volunteers to work in an exhibit area on the circulatory system. Or a professional potter might assist in training a volunteer to demonstrate for visitors how primitive cooking pots were made. A volunteer from the Weavers Guild may teach or interpret Mayan back strap weaving.

Karla McGray will also be looking for "volunteer managers" to assist her in coordinating this complex volunteer Program. "A person with extensive volunteer experience and knowledge of basic management skills could very easily function in a volunteer-volunteer management position here."

Besides recruiting people with a wide diversity of talent, training and interests, the Museum will be making a special effort to involve many age levels of volunteers and many sectors of the community in its volunteer program.

Physically handicapped persons, for example, will be recruited to be an essential part of the Handicapped Resource Center in the new Museum. The Resource Center, located near the Museum entrance, has been developed as a place where the handicapped visitor can find information on specially designed equipment and programs and obtain general advice on how they can maximize their visit to the Museum. This area is an excellent place for the handicapped volunteer -- one who understands the unique problems which face the disabled visitor.

The exhibits and activities in this area will also give the non-handicapped visitor an opportunity to understand what it is like to have a disability. With the help of audio-distortion equipment, for instance, the visitors can discover for themselves what deafness is like. Formal or informal presentations by handicapped volunteers will add significant meaning to this program area.

The Museum is also exploring programs in the Twin Cities area for mentally retarded persons. Hopefully this versatile facility will serve to provide itself as a resource for programs seeking ways to involve mentally retarded individuals in meaningful experiences in the community.

A variety of ethnic groups from the metropolitan area will be recruited and can offer special enrichment to the cultural exhibit areas. By sharing cultural crafts and traditions, these volunteers may add a new dimension to programs on an on-going basis or for special events related to ethnic holidays.

During the next year, the Museum will be inviting senior citizens to volunteer, informing them that they are very much needed. This thrust will be a part of the Museum's involvement in a statewide "life long learning" program supported by Vice President Mondale. The Museum feels that this particular group can enrich almost any area by sharing personal life experiences of historical value or contributing special acquired skills. In the Weather Station an older person may recount the "great Drought" of the 30's or share the experience of the Armistice Day blizzard. A retired television engineer could act as a consultant on the Communications Center and interpret this area to visitors once it is in operation. The Museum is already borrowing the knowledge and help of a retired 3M Company scientist in setting up a physics workshop.

This workshop will also be used by volunteers from the other end of the age spectrum. Interested junior high and high school age students will be able to work on special projects here with the aid of "advisor" volunteers from the scientific or educational community.

Staff members in the Museum have been assessing ways to involve children more directly in the Museum as volunteers. Traditionally this group visits the Museum with parents or teachers and is not given the opportunity to share their own perspectives with others. Being in the Museum environment as a volunteer would help to stimulate a young person's enthusiasm for learning and enhance his personal growth while facilitating other children in learning.

The Science Museum of Minnesota will approach the corporate and business community with information about volunteer opportunities uniquely designed for working individuals. Exploring the concept of "release time," the Museum hopes to assist companies in fulfilling community involvement contributions. For companies not affording their employees this benefit, evening and weekend commitments will be negotiated for those individuals needing personal satisfaction and gratification outside of their work experience.

To aid many parents who would like to volunteer, the Museum is exploring the possibility of developing a day care situation, perhaps even in the Museum itself. This may be an area to involve University child development students or a 4H student needing to fulfill a child care project. It's an exciting concept and could facilitate unpaid staff in making their volunteer experience easier to arrange.

For every volunteer, involvement with the Museum will be an educational experience. Ongoing in-service workshops and training programs conducted by specialists and staff will provide valuable experiences for volunteers interested in acquiring additional job skills. The Science Museum will be keeping detailed records of training and skills acquired by each volunteer. These records will help the SMM staff in writing job recommendations for volunteers seeking future employment and can be a valuable addition to their resumes. The Museum plans to negotiate with Twin Cities Universities to offer its volunteers the opportunity to have their experiences evaluated and assessed for college credit.

Volunteering at The Science Museum of Minnesota will also be a form of community education. A volunteer will be able to select or be placed in an area of interest, expand his/her knowledge in this area through an intense training program and spend as much time volunteering in this area as he/she chooses. When the volunteer is ready for additional growth, he/she can either receive additional training in the same area or select another area of interest and add on to their skills with a new program. This "add-on" educational approach allows the volunteer flexibility plus the opportunity to increase his/her knowledge and skills at a speed that is comfortable for them.

The Museum will be making a special effort over the next year and a half to develop this Human Resources program and recruit and involve volunteers from many diverse communities. Each volunteer will have something special to contribute drawing from his or her own personal or professional background. In bringing this variety of personal experiences to the Museum programs, SMM will be a continually growing and changing place. The Science Museum of Minnesota's all-inclusive volunteer program drew this response from Barbara Fertig, Coordinator, Center for Museum Education, *"To my knowledge, no other museum or science center is attempting to involve so many kinds of volunteers on so many levels...(it) points an exciting new direction for museums."*

In the Winter 1978 issue of Volunteer Administration, Norma Selvidge contributed an article titled "Marketing Volunteering." One savvy recruitment ploy cited by Ms. Selvidge is reprinted here. (Volunteer Administration is published quarterly by the Association of Volunteer Bureaus, Boulder, Colorado. Please see the periodical section of this courcebook for more information on the publication.)

"MARKETING VOLUNTEERING"

--Norma Selvidge
Volunteer Administration
Winter/1978

In selecting the medium for the message, the volunteer coordinator should phrase the message according to the buyer's needs and language. When selecting a medium such as a newspaper, people usually go to the paper to promote their own concept and ask the paper to do them a favor by printing the story. What is the newspaper's goal? Financial solvency through advertisement and provocative news to enlarge circulation is one of the goals. Therefore a news story written in interesting fashion can meet one of the newspaper's goals. One volunteer coordinator has received exceptional coverage in the local newspaper. She finds interesting stories and just incidentally includes information about the volunteer activities. The story meets both the newspaper's and coordinator's goals. The image of volunteering is enhanced as the story reveals the kind of active, exciting people who are attracted to volunteering. Over time the coordinator has created a trusting relationship so that an article from her gets the paper's attention. She has earned a reputation of exchanging worthwhile products.

Other mediums for getting your message distributed can be uncovered through an assessment of your community. For the distribution of pamphlets you might consider including your message in these delivery sources: bank statements, teacher's boxes at school, welcome wagons, scouts, public libraries, newspapers, and department stores. Use creative thinking and brainstorming to develop sources of selling the image of volunteering.

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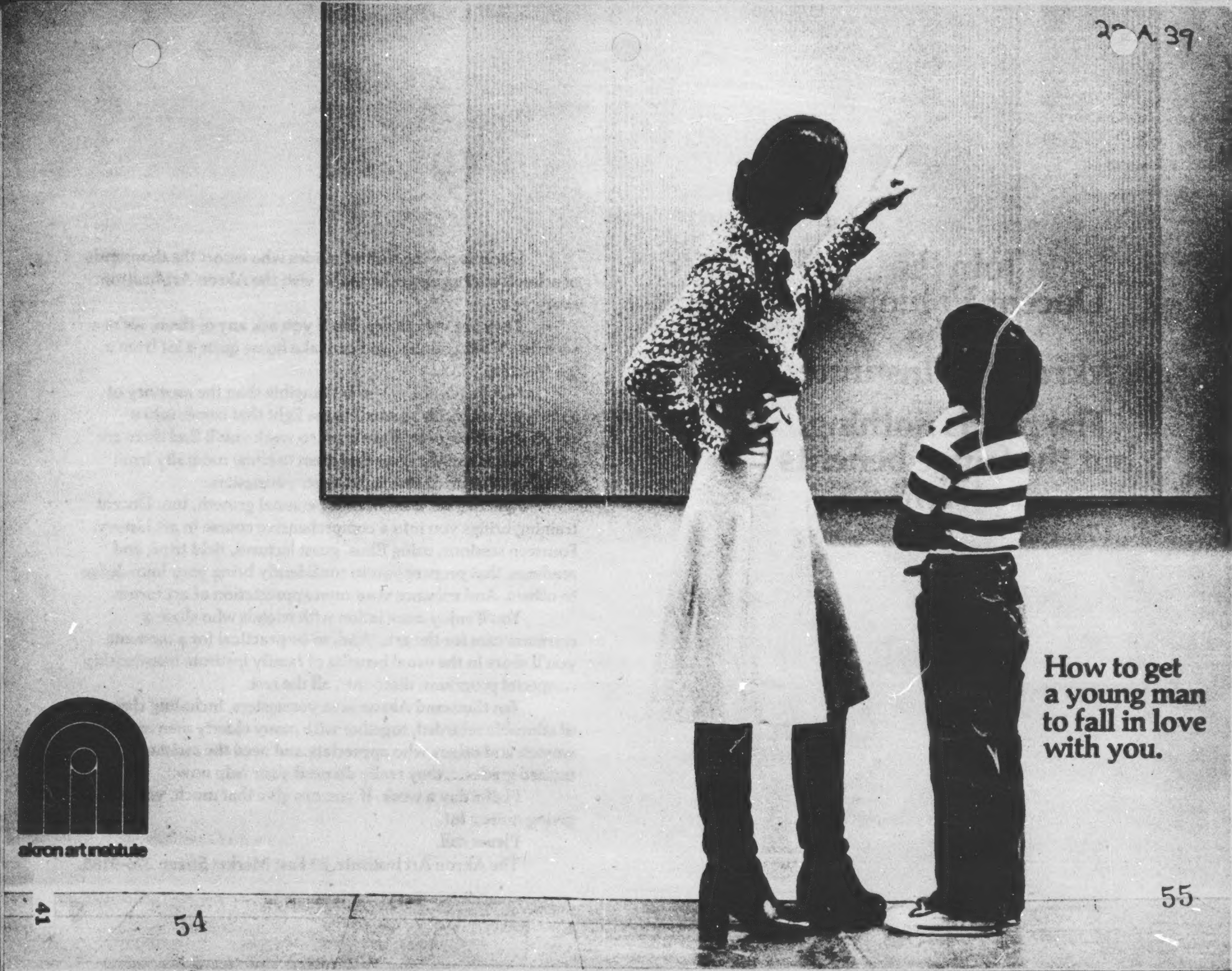

How to get
a young man
to fall in love
with you.
akron art institute

Join the Docent Volunteers at the Akron Art Institute.

The pay is nothing, but the fringe benefits are terrific.

Docents are the trained guides who escort the thousands of schoolchildren and others who visit the Akron Art Institute every year.

They are volunteers. But if you ask any of them, we're sure they'll tell you that you can take home quite a lot from a job like this…

Maybe it's nothing more tangible than the memory of someone's smile. Or as small as the light that comes into a child's eye. Whatever, from week to week you'll find there are real personal satisfactions that seem to come naturally from bringing the love of fine art to eager youngsters.

And there is a chance for personal growth, too. Docent training brings you into a comprehensive course in art history. Fourteen sessions, using films, guest lectures, field trips, and readings, that prepare you to confidently bring your knowledge to others. And enhance your own appreciation of art forms.

You'll enjoy association with friends who share a common care for the arts. And, to be practical for a moment, you'll share in the usual benefits of family institute membership …special programs, discounts, all the rest.

Ten thousand Akron area youngsters, including classes of educable retarded, together with many elderly men and women and others who appreciate and need the assistance of trained guides… they really do need your help now.

Half a day a week. If you can give that much, you'll be giving quite a lot.

Please call.

The Akron Art Institute, 69 East Market Street, 376-9185.

I WANT TO LEND MY
TALENTS TO LOCH
HAVEN ART CENTER

CHECK AN AREA OF INTEREST.

- ☐ Art Center Shop
- ☐ Membership Hostess
- ☐ Docent
- ☐ Receptions
- ☐ Potpourri

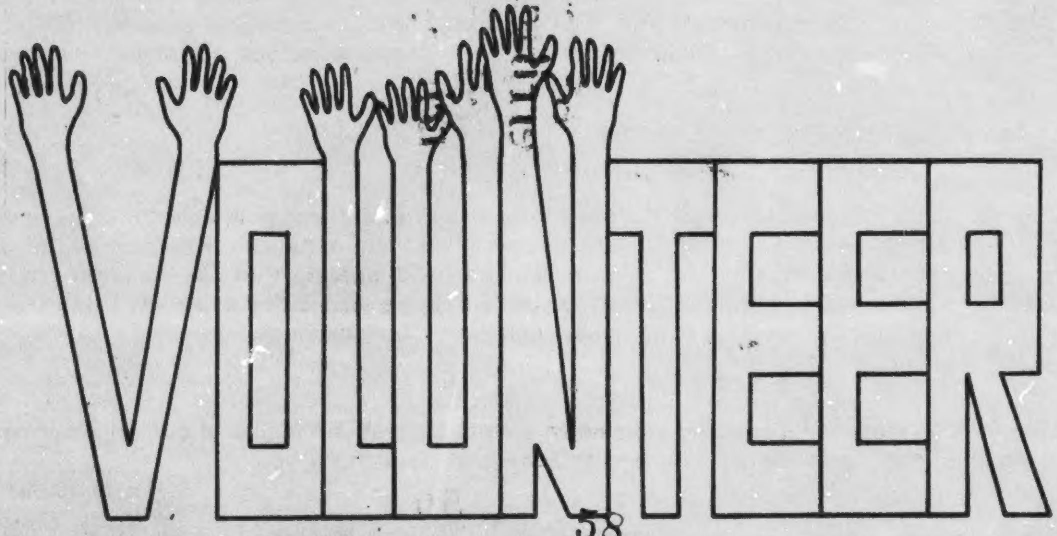
Miss/Mr./Mrs./Mr. & Mrs./Ms.

Address (Phone) Home

City State Zip

Please return this form to: **The Loch Haven Art Center, Inc.**
2416 North Mills Avenue, Orlando, Florida 32803

LOCH HAVEN ART CENTER, INC.
2416 NORTH MILLS AVENUE
ORLANDO, FLORIDA 32803



INTRODUCTION:

The Loch Haven Art Center Volunteers are a special group. They help us with their hands, their heads, and their hearts. They keep the Art Center growing.

Members of our volunteer staff not only provide invaluable service, but also gain new experiences, learn how a museum works, see our exhibits of outstanding art works and meet many new people.

As more and more people are discovering our unique opportunities for enjoyment and learning, we need to keep pace in an ever-expanding role of community service. WE NEED **YOUR** HELP. Choose an area to meet your interests and lend your talents to the many spheres of Museum life.

ART CENTER SHOP Jewelry, pottery, Pre-columbian art, a vast array of books and many other unique gift items can be found in our gift shop. Our volunteer sales clerks are essential in order to open the shop on a regular basis. No previous sales experience is necessary. We provide professional training. It is necessary for this volunteer to commit 3 hours one day a week to this position, which provides an opportunity to meet and work with people in a creative and exciting environment.

MEMBERSHIP HOSTESSES Welcoming our daily visitors and helping them to understand the Art Center and the variety of programs we offer are the duties of our membership hostesses. By providing accurate information, you can encourage others to become members, and fully enjoy and support their Art Center. A sunny disposition and outgoing personality are the basic requirements for this position. Another excellent opportunity to meet and work with people in a creative and exciting environment.

DOCENTS What is a docent?? A docent is a teacher or a lecturer. Docent duties are varied but the primary function is to conduct educational and informative tours of exhibitions for the general public and school children of all ages. An art background is not necessary as all docents receive a comprehensive ten week training session given by the Curator of Education. Any volunteer who has an active curiosity and a desire to learn will find this an excellent opportunity for personal enrichment and education.

RECEPTIONS Here is a unique opportunity to let those gourmet cooking talents shine! Volunteers are needed to prepare delicious delicacies for many of our social functions, such as receptions for preview openings of exhibitions. Spend an enjoyable evening working with others preparing the food, decorating tables, swapping recipes, and acting as hostesses!

NONE OF THE ABOVE??????

POTPOURRI Often the Art Center has the need for specialized assistance in specific areas such as: **Education** - Audio visual, library (slides & teaching assistants; **Exhibitions** - Carpentry, fabrication, research, exhibition installation, hand-lettering; **Publicity** - photography, commercial art, journalism, delivery of posters, flyers etc.; **Office Aides** - Typists (Accuracy not speed), research, filing, class registration, bulk mailings.

Please fill out the form on the reverse side and indicate an area of interest. A member of our volunteer council will call and make arrangements to talk with you and find the best position for you!

STRUCTURE FOR VOLUNTEER GROUPS

Although volunteers are organized quite differently from one museum to another, some kind of order is desirable in order to define responsibilities and promote communication between the museum and the volunteer group. Some volunteer groups are organized outside the museum's aegis, assuming for themselves the responsibility of recruiting, training and scheduling their members for service to the museum, and relieving the education staff of much routine work and bookkeeping. Other museum educators feel that they want the responsibility for providing staff support, and can afford to invest in the professional time required to administer such a program.

In any case, the volunteer organization needs an internal structure that promotes harmony and mutually acknowledged goals for both the museum staff and the volunteers who serve them. To this end, various museums and volunteer organizations have developed contracts, by-laws, sets of standards and organizational outlines.

In this section you will find:

--"Docent Standards and Roster" from the Art Museum of the University of Texas at Austin;

--an outline for a Volunteer Development System from the U.S. Department of Health, Education and Welfare;

--a volunteer/museum contract from the Mint Museum of History, Charlotte, North Carolina, and

--by-laws from the Oakland Museum Docent Council and the Wadsworth Atheneum.

Many of the issues addressed in these documents are common to all kinds of volunteer organizations; you may be able to transpose them for your own setting.

In 1974 Deborah Franklin and Susan Mayer of the Education department, University of Texas Art Museum, Austin, wrote a manual for their volunteers. This chapter, one of several selections from the manual included in this sourcebook, defines the volunteer organization and clearly articulates the expectations of the education staff for volunteer performance.

II. DOCENT STANDARDS & ROSTER

The docent program is organized by and operates under the direction of the Educational Curator of the University Art Museum. It does not exist within the framework of a "club" organization, and has no constitution or by-laws. It does not hold meetings in a form set down by Robert's Rules of Order or any other constitutional authority. Its meetings, committees, standards and rosters are informal and are subject to change or revision at any time, based upon the needs of the museum's exhibition schedule and the docents who volumteer their time and efforts for that schedule.

Standards which are listed here may appear self-evident, but are included because they represent potential "trouble" areas if they are not observed by all the docents.

The Roster of Docents includes a steering committee, which is selected in the manner indicated below to assist the Educational Curator in the operation of the docent program. While the steering committee is a "working" one, and the emphasis is placed on this concept, it is also an honorary one, since the members of that committee are often called upon to represent the entire docent committee at official museum functions.

Usually there are three general meetings called during the museum's season -- one, in September, to organize the year's work; one, in January, a mid-year discussion session; and an end-of-the-year luncheon at which statistics are announced and appreciations expressed. These meetings are in addition to the many training sessions scheduled during the year.

STANDARDS

Approach: A good docent tour depends upon the manner in which a tour is conducted. This includes being natural, at ease and pleasant, even though at times it may prove difficult. A docent should be enthusiastic and interested, not only in the exhibition but in the people who come to see it. Each tour should be an adventure, a "discovery," not only for the audience, but for the docent.

Realiability: It is important that each docent feel a sense of responsibility to do a fair share in the group obligation for an exhibition. The best docent in the world cannot be considered a sustaining member of the program if unreliable.

Attendance: A docent is expected to be interested in the entire exhibition program at the University Art Museum. Meetings, lectures, films, and tours are planned for the docents' benefit throughout the year and should be missed only when absolutely necessary. An undue amount of absences without excuse over a period of one year will be sufficient cause to ask a docent to resign.

Punctuality: A docent should be at the museum at least a few minutes before the tour is scheduled to begin so that time is set aside to relax and "gather one's thoughts." School children especially are on a tight bus schedule, so the students lose precious moments in the museum if the docent is late. Since parking is usually a problem, time should be allowed for this inconvenience as well.

Preparation: Using the materials given to the docent by the museum as a *beginning,* a point from which to start, the docent must then do the necessary work for a complete preparation, using the bibliographies usually supplied. Comprehensive notes should be taken at lectures and training tours, and all materials should be carefully organized and preserved. Then the docent is required to prepare a written plan of the tour which is submitted to the Educational Curator before the first tour of the exhibition is conducted.

Reference: All notes and copies of tour plans, docent training materials, catalogues, etc. should be kept by docents, and maintained in such a way as to provide easy, accessible reference for future needs. It is also hoped that, within the limit of a person's interests and financial ability, a home art library will be established, and will be one of the most rewarding aspects of the docent program.

A docent may use the University of Texas libraries, including the art library, but may not take out books unless a library card is purchased from the Registrar's Office in the Main Building on campus. At no time will a docent be allowed to take out books which are on reserve.

Working together: Although the docent program is made up of individual persons performing individual tours, the group relationship should never be ignored. The strength of the docent program lies in its weakest member. A docent must constantly strive to raise performance quality and be prepared to help others in the group toward this end when asked. A new docent who is guided diligently and "tenderly" by his or her sponsor, should be able to conduct tours with confidence and ease in a short time. More experienced docents may find it helpful to enlist the aid of a colleague in preparing for a tour. Using a "buddy system," two or three docents can work together to make up their tour plans anddo informal evaluations of their tours. At times, docents with special training, education or experience, may be called upon to demonstrate tours for the entire group, and should consider this task a privilege and an obligation to the group.

Any problem a docent has with tours, plans, sponsorships, etc. should be faced and discussed as soon as possible so that it will not become exaggerated and a source of anxiety. These problems may be discussed at any time with the Educational Curator.

ROSTER

Docents-in-Good-Standing: A Docent-in-Good-Standing is one who has served in the docent program at the University Art Museum for at least one year; has a satisfactory attendance record at training sessions, called meetings and tours; has conducted a minimum number of tours during the past year; and is obligated to a full docent commitment for the coming year. The docent is eligible to sponsor a new docent; receives all notices, invitations, and docent training materials, and is entitled to all privileges accorded to active docents.

Alternates: Due to prior commitments, family or business obligations or illness, a docent may request to be designated an Alternate docent for one year. Alternates will receive all notices, invitations, and docent training materials, and will be entitled to all of the privileges accorded to active docents, but will *not* be obligated to a full docent commitment for the year. An Alternate will be expected to resume full active status when personal obligations permit. After one year, however, an Alternate will be placed on the inactive docent list until such time as a full docent responsibility can be resumed. At that time a docent may be reinstated by the Steering Committee, with the approval of the Educational Curator. If several years elapse before reinstatement, the docent may be designated a Docent-in-Training, based upon the number of years intervening and/or a performance assessment by the Educational Curator.

Docents-in-Training: New docents will be invited to join the program by the Steering Committee, with the approval of the Educational Curator, and will be designated as Docents-in-Training. During the training period, of indeterminate time based upon individual needs, the new docent will be guided and evaluated by a sponsoring docent. The Docent-in-Training will receive all notices, invitations, and training materials, and will be obligated to attend all training sessions and called meetings. The Docent-in-Training will accompany the sponsoring docent at least through the first exhibition tours, and until such time as the sponsoring docent and the Educational Curator feel that the new docent can handle tours alone.

Sponsors: A sponsor is a Docent-in-Good-Standing who serves as a guide for a Docent-in-Training, introducing that person to the University Art Museum's Docent Program, helping to prepare tours and outlines, acting as resource person in the use of training materials, the art library, etc. The sponsor takes the responsibility of seeing to it that the new docent comes to training sessions and lectures. The sponsor should discuss any problems which arise from the sponsorship with the Educational Curator. When the sponsor thinks that the docent is ready, a request for an evaluation by the Educational Curator will be made. The Educational Curator, acting upon the recommendations of the sponsor and a personal evaluation of the new member's tour performance, will advise the Steering Committee of the readiness of the new docent to conduct tours alone.

Steering Committee Chairman: The Chairman is a Docent-in-Good-Standing, chosen by the current Docent Chairman and the Steering Committee, with the approval of the Educational Curator, and serves for a minimum of one year, but not longer than two consecutive years. The Steering Committee and Chairman will announce the name of the new Docent Chairman by May 31st, and the new Chairman will assume duties after that time. The Chairman acts as a liaison between the museum and the docents, chooses a Steering Committee to help with duties as outlined below, keeps the docents and Educational Curator informed of all actions taken by the committee, and is directly responsible to the Educational Curator for all such actions.

Steering Committee: The Steering Committee is selected by the new Chairman with the approval of the Educational Curator. There will be a minimum of 5 Docents-in-Good-Standing on the committee, including the immediate past-Chairman. When the immediate past-Chairman cannot serve on the committee, a member of the immediate past-Steering Committee may be chosen instead. The Steering Committee members will serve for a minimum of one year, but not longer than two consecutive years (unless as Chairman of the committee). The new Chairman will announce the names of the Steering Committee no later than August 31st. When a new Steering Committee cannot be assembled by this date, the immediate past-Steering Committee will assume its duties until a new committee is selected.

Duties of the Steering Committee: A member of the Steering Committee acts in the place of the Chairman when necessary; if possible, the Chairman will designate that person. The members of the committee act primarily as a telephone committee; they are a review board and a liaison between the museum staff and the docents in attempting to solve problems as they arise; they enlist and recommend new docents to the program; they provide sponsors for new docents when necessary; they operate the social functions of the program, instigating and organizing as many or as few as they desire without interfering with the "business" of the program; they select the new Docent Chairman.

A Volunteer Development System is published by the Office of Volunteer Development, Department of Health, Education and Welfare. It is intended for a far broader audience of volunteer supervisors than this sourcebook includes, but provides thoroughly sensible ideas that can be adapted to the museum setting.

A Volunteer Development System

One out of every four Americans over the age of 13 does some form of volunteer work during the year. That means that nearly 40 million citizens—40 percent of whom are men—give their time, energy, and effort to some cause.

This vast resource is often untapped by human services delivery systems supported by HEW. Although administrators of human services programs universally express commitment to greater volunteer participation, and often volunteer themselves, few take full advantage of this valuable potential. Inadequate planning for volunteer participation is generally the reason for lack of meaningful volunteer involvement.

HEW encourages volunteering because:

- Volunteering as an option is a basic human right—everyone can help someone. We all need to be needed.
- Volunteers can represent a significant program resource, and they can provide a capacity to mobilize community support.
- Volunteers can extend and reinforce the work of paid staff—but they should never be used to supplant paid staff.
- Volunteers can improve program performance by acting as linkages within the community, interpreters of services, advocates for the inarticulate, as recruiters, trainers, or supervisors, and extend the outreach of the paid staff in delivering services.
- Volunteers come from all parts of communities, are all ages and do all sorts of things. Never underestimate the value of youth, older persons, the poor, or minorities to improve the quality of programs.

In order to use their abilities effectively and to grow, volunteers need help. This help should be in the form of a well-planned, volunteer development system based on the following principles:

- A freedom of choice is essential for volunteers, staff, and the persons being served. Volunters work *with*, not for other people. Expectations and goals should be defined in clear, contractual terms.
- Volunteers need appropriate placement to utilize their skills, knowledge, and interests; training to supplement their knowledge and skills; a place and tools to work with; and someone to turn to for support, encouragement, and appreciation.
- Volunteers need periodic review of their accomplishments and growth opportunities when ready for more or different responsibilities; records to prove their service and training; and recognition.
- Volunteers need access to the policy development process. Firsthand perspective helps policy makers focus on priority needs.

A volunteer development system produces enriched and more effective services and an informed dedicated citizenry ready to participate in collaborative efforts outside the agency in meeting human needs, and attacking problems. Solving some problems may create new ones, so there is an ever-expanding need for this kind of citizen network.

A volunteer system must be well conceived and create a climate in which people can risk giving their best. An ideal program is staffed with a full time administrator who decentralizes administration to line staff as readiness is indicated.

Provision of opportunities to participate in policy development, program innovation, and advocacy roles attracts and motivates the best volunteers. A volunteer system is a continuously intrinsic part of the overall program planning cycle and fits into the total system, rather than being a separate program.

All long-range planning in the human services delivery area should include explicit provisions for volunteer participation in providing services, in interpretation, setting program goals, and in carrying out program goals.

The following chart illustrates the basic elements of a volunteer development system. Additional information can be obtained by writing Office of Volunteer Development, HEW, Washington, D.C. 20201.

DHEW Publication NO. (OHD) 76-10006

A VOLUNTEER DEVELOPMENT SYSTEM

Division of Responsibilities in Overall Volunteer Development Cycle

Phase I Preparation	Phase II Operation	Phase III—Evaluation/Future Planning
Executive Demonstrate support for volunteer development: A. Establish volunteer development system B. Set long-range goals and objectives for volunteer development system involving leadership, paid staff, boards or committees, volunteers, and consumers C. Appoint qualified Director to focus efforts D. Designate staff time to define roles, prepare training, evaluate plans, meetings E. Communicate support through: Staff meetings Memos of authorization Public statements	**Executive** A. Support recruitment through public statements, community activities B. Offer explicit encouragement—welcome trainees C. Monitor progress D. Informal observation E. Encourage staff cooperation F. Allocate support as needed	**Executive** A. Evaluate actual performance of the volunteer development system against targeted goals and objectives B. Assess overall effect of volunteer on agency's ability to respond to needs C. Assess overall cost/benefit of volunteer development system D. Assess long-range effects of volunteer development system on agency consumers, community E. Provide for volunteer perspective input in new program development cycle F. Make recommendations for future priorities for volunteer development system G. Recognize the status of Volunteer Director as member of top administrative team and volunteers as essential to agency services
Volunteer Director Define goals and objectives for volunteer development system: A. Work with unit heads, line staff, representative volunteers and consumers defining needs for volunteers B. Assess community for volunteer resources: 1. Volunteers Voluntary Action Center Service Groups Schools and colleges, etc. 2. Organizations interested in cooperation C. Establishment referral, reporting and record systems D. Plan and budget for: Office services Volunteer expenses Public relations Recognition process E. Develop orientation and training procedures for staff, volunteers and self.	**Volunteer Director** A. Activate continuous targeted recruiting B. Develop skill bank and record bank of opportunities for volunteer assignments C. Counsel new volunteers, refer to units D. Operate orientation, training events E. Record assignments, training F. Participate in program development G. Cooperate with other agencies, educators to develop learning opportunities and joint programming H. Operate feedback system through meetings, roundtables, evaluations I. Represent volunteerism—to executive, staff, consumers, volunteers, volunteer resource groups, public J. Arrange for mobility and progression of volunteers; recognition of volunteers, staff K. Work with community volunteer administrators, professional groups, volunteer centers, civic and consumer groups	**Volunteer Director** A. Collate and record volunteer service and training B. Assess referrals, dropouts, special accomplishments, services; consumer, volunteer, and community reactions C. Assess the capacity of volunteers to provide services and accept responsibilities through staff, consumer, and community reactions; honors; offices held; etc. D. Assess effects of volunteer development system on community understanding E. Measure impact of volunteer effort on program operations/delivery of services F. Summarize and make recommendations from data gathered for future priorities for volunteer development system G. Adjust recruiting, referral and training plans in tune with new priorities H. Insure volunteer perspective in future program development efforts
Line Staff and Supervisors A. Define unit and specific program objectives for volunteer services, unmet needs, volunteer opportunities, requirements B. Contribute ideas for volunteer assignments, group projects C. Suggest ways target group members could volunteer D. Schedule time for: 1. Own training 2. Counseling, placing, working with and through volunteers 3. Participation in orientation and training of volunteers 4. Unit staff meetings, volunteer meetings, joint staff/volunteer meetings 5. Recording and reporting quantity, quality, impact	**Line Staff and Supervisors** A. Interview, place volunteers B. Refer target group members as volunteers C. Recruit volunteers from own professional groups, membership organizations D. Operate on-the-job training for volunteers, provide counseling or supervision in groups as well as to individuals E. Review impact and extent of volunteer participation in unit F. Provide regular reports of service, changes, new needs, training requests, program recommendations G. Participate in recognition process—selection, awards, promotion to greater responsibilities, etc. H. Provide feedback from experience for future planning, public education, citizen recruitment	**Line Staff and Supervisors** A. Evaluate impact of volunteer effort on: Staff Target group (consumers) Volunteers B. Assess performance of executive and Volunteer Director in the volunteer development system C. Summarize and make recommendations of program effectiveness from staff reports, target group responses, volunteer assessment D. Submit plans for supervision patterns and on-the-job training E. Submit future requests for volunteers, suggest sources

As one of the contributors to the section on "Thinking it Through" mentioned, volunteer contracts need not be formal, as long as you are sure that both staff and volunteers agree on what is expected of each. For those readers who prefer to formalize the agreement, here is a contract taken from the volunteer manual of the Mint Museum of History, Charlotte, North Carolina. It is important to note that there are two sides to the contract, indicating the museum's committment, as well as that of the volunteers. You might consider negotiating the contract's terms with your own volunteers. This might help you to learn what your volunteers feel they need from you, and whether they feel capable of assuming the responsibilities you have asked of them.

VOLUNTEER - MUSEUM CONTRACT

The Volunteer agrees:

-- to work a minimum of two half-days a month. (approx. 6 hrs.)

-- to make an initial committment of one year of duty.

-- to be prompt and reliable in reporting for scheduled work, and to provide the museum with an accurate record of hours worked by signing in or out when entering or leaving.

-- to attend orientation and training sessions as scheduled and to undertake continuing education when provided by the museum to maintain continuing competence.

-- to notify the Coordinator if unable to work as scheduled. The Volunteer will be responsible for securing a replacement, and notify the museum of the change.

-- to become thoroughly familiar with the museums' policies, philosophy and procedures, both written and verbal.

-- to realize that the museum and its paid staff welcome questions and suggestions from volunteers and encourage participation and suggestions on improving museum facilities and policies.

-- to direct all questions from visitors concerning programs, policy or the facilities to the professional staff.

-- to carry out responsibilities in good spirit and to seek the assistance of the Coordinator in any situation requiring special guidance.

-- to accept the museums' right to dismiss any volunteer for poor performance or poor attendance, after a proper review by the Advisory Council.

Charlotte Museum of History agrees:

- to provide a Coordinator of Volunteers who will be responsible for hiring, firing, orientation, training, and supervision of all volunteers. The Coordinator will be available to guide and assist the volunteers during their scheduled working hours.
- to furnish a description of the work each volunteer is required to perform.
- to train volunteers to a level that will permit them to begin their work confidently.
- to provide on-going training when appropriate and needed.
- to make written evaluations of volunteers' performance on-the-job at suitable and regular intervals.
- to provide volunteers with a certificate of service for satisfactory work, and to supplement the certificate with a detailed recommendation if requested by a volunteer when applying for a job elsewhere.
- to create a Volunteer Advisory Council consisting of the Volunteer Coordinator and three members of the volunteer organization.
- to provide certain benefits including a discount in the museum shop, educational outings, and social gatherings.

Date

Volunteer

Docent Coordinator

Curator

We have included two sets of by-laws for volunteer organizations. The Oakland Museum Docent Council is a large organization involved in many activities, and its by-laws indicate how thoroughly it has thought out every aspect of its structure. There may be more information than you need, but many issues that you might otherwise have overlooked. The by-law structure outlined by Roger Selby in his article for Museum News suggests a middle ground between the complexities of the first set, and the decision at the University of Texas Art Museum not to have any constitutional documents. In setting out these options for your use, we wish to underscore the suggestions made by various contributors to this sourcebook that a) some definition of mutual expectations on the part of the volunteer and of the museum be made and jointly recognized, and b) that harmony and good will between museum and volunteer are much advanced by having both participate in the design of agreements by which both must carry on their work together.

Bylaws for Volunteer Groups

Roger L. Selby

Well-formulated bylaws can help to maximize the contribution of volunteer groups.

excerpted from an article in **MUSEUM NEWS**
September/October 1977

Two facets of bylaws may be considered: those sections that are primarily the concern of the volunteer organization, such as election of officers and schedule of meetings, and those that directly affect the institution and its needs (those sections are italicized below).

An Outline for Volunteer Bylaws

Article I

Name of the Volunteer Organization

Article II

Purpose of the Organization

(Example: To aid and foster the objectives of the institution *under the guidance and approval of the director*. All of its activities, and those of its officers and members shall be directed to that end.)

Article III

Membership

1. Method of application
2. Review and selection of candidates as applicable. *Membership shall not be denied on the basis of race, religion, creed, national origin, age or gender.*
3. Description of classes of membership, *i.e.*, candidate, active, honorary. If the candidate class is defined, it would be appropriate to note the need for a *specific training program, approved by the museum, that would cover such topics as the collection; facilities and activities of the institution; staff, its function and organization; history of the institution; history, organization and purpose of the volunteer group.* If there is no candidate status, training should be mentioned elsewhere, for instance, under requirements for membership.
4. Requirements for membership. Specifically state *membership in the institution* if you wish volunteers to be members.
5. *Expulsion of members.* One method is a three-fourths vote of the executive committee. Members might be expelled for a lack of participation in activities or meetings, failure to become an institutional member or failure to pay dues.

Article IV

Volunteer Board

The composition of the board; number of members; election procedure and term; procedure for filling vacancies; number constituting a quorum; duties of board members.

Article V

Officers

List the officer positions, the length of term and election procedure; method of filling vacancies.

Article VI
Duties of Officers

Article VII
Executive Committee

The committee's composition, responsibilities and the number required for a quorum.

Article VIII
Nominating Committee

The committee's function and how its members are chosen.

Article IX
Finances

1. *The fiscal year of the organization shall correspond with that of the institution.*
2. Annual dues (how determined, method of payment)
3. Annual dues are to be used for the business and social expenses of the volunteer organization as determined by the executive committee.
4. *The expenditure of funds, other than those necessary for reasonable operating expenses, must receive the approval of both the organization and the director.*
5. *All funds held in the name of the organization are the legal property of the institution and will continue as such in the event the organization should cease to exist as authorized in the bylaws. The receipt, budgeting, disbursement and accounting of all funds will be carried out in accordance with procedures established in agreement with the institution and its auditors.*

Either under finances or duties of the treasurer (Article VI) mention should be made of *the method and frequency of reports filed with the institution.*

Article X
Meetings

This section should discuss annual meetings, executive committee meetings, special meetings, written notice of meetings, and the number required for a quorum.

Article XI
Liaison with Other Museum Volunteer Organizations

This section might state that the president of the volunteer organization shall be an honorary member of all other volunteer organizations and shall be invited to the meetings of their membership.

Article XII
Staff Liaison

If a staff liaison other than the director is appointed, the terms of reference should be noted.

Article XIII
Amendments

Article XIV
Procedures

Bylaws might incorporate a set of procedures that further interpret, expand or reflect the varied nature of the volunteer group in relation to other groups.

Article XV
Dissolution of the Organization

Bylaws must reinforce the fact that volunteers serve at a staff assistance level. Volunteers' goals should be attuned to this need and should be incorporated into any set of procedures attached to the bylaws. If the volunteer organization is a major fund raiser for the museum, one of its members should be appointed to the board of trustees. However, every volunteer organization need not be formally represented. An individual selected as a trustee on merit may also, by chance, be a member of the volunteer organization, but the two roles should not be confused.

Many volunteer organizations are unclear as to the ownership, distribution and accounting methods of funds in their possession. Control of funds by the institution is seldom specified in bylaws. This should be corrected. It should also be clearly understood that the organization will have business expenses such as secretarial assistance, office supplies and travel. Individual members should not be asked to cover these costs from their own funds.

When volunteers raise large sums of money, the museum should be sensitive to their need to help determine the type of projects their funds might support. There is little incentive for volunteers to raise funds for normal or unspecified operations.

Finally, the question of finances will clearly determine whether the volunteer organization is independent or part of the institution. If it professes to be independent, it must have its own tax-exempt number and file an income tax return each year.

Many volunteer organizations remain select groups. It is long overdue that, as institutions held in the public trust, museums recognize that elitism is no longer acceptable. Museums that perpetuate the elite, select volunteer organization will maintain a negative image far more than they will by having an elite, select board. Careful selection of volunteers is a positive step, however, if it is done on the basis of institutional need and individual ability. Certainly, the first priority is to define the need, then to search for suitable candidates. Volunteer programs are far more effective when membership is based on ability rather than social standing.

Application forms should be used for volunteers in the same way they are used for paid staff. They should help determine the individual's attitudes and aptitudes, and the amount of time he or she can allot for volunteer service. New applications should be reviewed by volunteers and staff. It may also be decided to invite the candidate for an interview, particularly if he or she is a potential docent. Once the individual has been selected, a training program should be part of the basic orientation. Volunteers want to learn; they are willing to participate in a program with specific requirements if they are able to benefit from a meaningful training program that will help them do the job for which they have been hired.

It is obvious that museum volunteers are moving toward a paraprofessional status in which they are chosen on the basis of their abilities, trained and expected to meet stated job requirements. Perhaps this trend will eventually require that museums disband their current volunteer organizations and start new ones on different premises. But for the present, volunteers must have carefully written bylaws that define their role and establish a place for them in the institution. △

BYLAWS

OAKLAND MUSEUM DOCENT COUNCIL

(As amended April 20, 1976)

ARTICLE I
Name

The Name of this Organization shall be the OAKLAND MUSEUM DOCENT COUNCIL.

ARTICLE II
Purpose

The OAKLAND MUSEUM DOCENT COUNCIL is a volunteer service group sponsored by the OAKLAND MUSEUM ASSOCIATION to provide educational services in aid of and in connection with the OAKLAND MUSEUM. The OAKLAND MUSEUM DOCENT COUNCIL has three departments which correspond to three of the departments of the Museum: Art, History, and Natural Sciences.

ARTICLE III
Membership

Any person who has satisfactorily completed the Docent Training Course and thereafter continues to serve the Museum in a manner which fulfills the obligation of membership as specified below is a member of the OAKLAND MUSEUM DOCENT COUNCIL.

Section 1. Active Status: An Active Docent shall serve the Museum at least twenty shifts (60 hours) a year and shall meet the graduate training requirements of the OAKLAND MUSEUM DOCENT COUNCIL and the appropriate Department(s).

Section 2. Sustaining Status: A Sustaining Docent shall serve the Museum at least ten shifts (30 hours) a year and shall meet the graduate training requirements of the OAKLAND MUSEUM DOCENT COUNCIL and the appropriate Department(s).

To be eligible for Docent Council Sustaining Status, a docent shall have satisfactorily completed training and at least three (3) years of the required service obligation.

To request Sustaining Status a docent shall make written application to the Department Chairman for approval by the Department's Representatives. The number of Sustaining Status Docents shall be subject to yearly review by the Department involved.

Section 3. Associate Status: An Associate Docent shall have satisfactorily completed training and at least one (1) year of the required service obligation.

Associate Status carries no service or graduate training obligation and the docent shall be ineligible for office in the OAKLAND MUSEUM DOCENT COUNCIL.

An annual fee, established by the Docent Council Board of Representatives, shall be charged for the privilege of Associate Status which shall include the right to receive docent mailings and to attend lectures, training sessions, and all docent activities.

To request Associate Status a docent shall make written application to the Department Chairman for approval by the Department's Representatives. Upon receipt of written approval of Associate Status, the docent shall pay the annual fee to the Docent Council within three (3) months. Failure to do so shall result in termination of membership in the OAKLAND MUSEUM DOCENT COUNCIL.

Section 4. Service Obligation: The service obligation for membership in the OAKLAND MUSEUM DOCENT COUNCIL shall be established annually within each Department by a committee composed of the Representatives to the Docent Council Board and subject to the approval of the Docent Council Board of Representatives. Prior to May first each committee shall review, evaluate and define the participation which fulfills this service obligation.

Tour Evaluation shall be an integral part of the service obligation of the OAKLAND MUSEUM DOCENT COUNCIL for all Active and Sustaining Docents. Each Department shall be responsible for the evaluation of its docents as follows:

(a) Docents shall be evaluated every three years.

(b) The Curators shall evaluate the performance of a docent.

(c) Tour evaluation shall be based upon an oral presentation.

(d) The docent shall be rated as (1) standard or (2) requires additional training. If the rating falls within item (2) reevaluation shall occur within six (6) months from the date of evaluation.

(e) Should the docent not achieve a standard rating upon reevaluation, the docent is eligible for only Associate Status in the OAKLAND MUSEUM DOCENT COUNCIL.

Section 5. Leave of Absence: A leave of absence without loss of membership in the OAKLAND MUSEUM DOCENT COUNCIL may be granted upon written request to the Department Chairman for approval by the Department's Representatives.

The granting of a leave of absence during a docent's evaluation year postpones tour evaluation to the year that the docent returns to Active or Sustaining Status.

Section 6. Termination: Membership in the OAKLAND MUSEUM DOCENT COUNCIL may be terminated by:

(a) A member upon submitting a letter of resignation to the Department Chairman.

(b) The Department's Representatives in accordance with Department standards. In this event, a hearing shall be granted upon the member's request.

(c) Failure of an Associate Status Docent to comply with Article III, Section 3 of the Docent Council Bylaws.

ARTICLE IV
Meetings

Section 1. The Annual Meeting of the Docent Council shall be held in the Spring to receive reports from all officers of the Executive Committee, members of the Board of Representatives, and chairmen of Council Committees.

Section 2. Special meetings of the Docent Council may be called by the President, or by five (5) Representatives, or upon petition signed by twenty percent (20%) of the members. Special meetings of each Department may be called by the Department Chairman or upon petition signed by twenty percent (20%) of the members of that Department. Notice of special meetings must be mailed to all members of the Docent Council, or of the Department concerned for a Department meeting, not less than five (5) days in advance of the meeting. Such notice shall include a statement of the purpose of the meeting.

ARTICLE V
Docent Training

Section 1. For each of the three Departments of the Docent Council, there shall be a training course for Docents. The Recruitment and Training Committee shall be responsible for establishing and reviewing requirements for admission to and graduation from said training courses with the approval of the Board of Representatives and the Curator of the Department involved and the Curator responsible for education.

Section 2. The Board of Representatives of the Docent Council under the direction of the Curators shall be responsible for the interdepartmental training and graduate training of Docents.

ARTICLE VI
Board of Representatives

Section 1. The administrative functions of the Oakland Museum Docent Council shall be vested in a Board of Representatives consisting of President and Treasurer of the Docent Council and four (4) elected Representatives from each of the three (3) Departments of the Docent Council. Non-voting members of the Board of Representatives shall be the Docent Coordinator and the Executive Director of the Oakland Museum Association or a representative from the Oakland Museum Association appointed by the Oakland Museum Association President.

(a) The Docent Council employs a Docent Coordinator who is responsible to the Docent Council Board of Representatives. The Docent Coordinator supervises staff persons employed by the Docent Council.

Section 2. Any programs involving the Docent Council or the use of its name for any reason must have the prior written approval of the Board of Representatives.

Section 3. The Board of Representatives shall meet regularly at such time and place as it may determine and announce in advance. A special meeting may be called only in case of emergency, on no less than 24 hours notice. Notice of such a special meeting, indicating the subject matter thereof, must be given to all members of the Board of Representatives. All meetings, except personnel sessions, shall be open to all members of the Docent Council.

(a) Eight (8) members of the Board of Representatives shall constitute a quorum; provided at least one (1) Representative from each Department of the Docent Council is present.

(b) Unexcused absences of the President, Treasurer or of any elected Representative from three (3) consecutive, regular Board meetings shall constitute a resignation of the absentee.

Section 4. The President of the Docent Council shall preside over meetings of the Board of Representatives.

Section 5. Members of the Oakland Museum administrative and professional staff shall serve as consultants to the Board of Representatives, as needed.

ARTICLE VII
Officers

Section 1. The officers of the OAKLAND MUSEUM DOCENT COUNCIL shall consist of the President, Treasurer, the Chairman from each Department, a Recording Secretary and a Corresponding Secretary.

Section 2. The President and Chairmen shall be elected as indicated in ARTICLE VIII and ARTICLE IX hereof. The Treasurer shall be appointed by the President-elect and the Executive Committee in March. To qualify for office, the Treasurer shall be a member of the Docent Council. The one-year term of office is to run concurrently with that of the President. The Treasurer-designate shall attend meetings of the Finance Committees of the Docent Council and the Oakland Museum Association immediately upon appointment.

The Recording Secretary and the Corresponding Secretary shall be elected by the Board of Representatives from their membership, at the regular Board meeting in July of each year; they may be appointed for a second consecutive term.

Section 3. The Department Chairmen shall serve as vice-presidents in the order designated by the President.

Section 4. Duties of Officers:

(a) President; The President shall be the executive officer of the Docent Council and shall preside at meetings of the Docent Council Board of Representatives and its Executive Committee and shall be an ex-officio member of all committees except Nominating. The President shall, with Board approval, create other committees as necessary.

(b) Treasurer: The Treasurer shall be custodian of the funds of the Docent Council and shall keep complete and accurate accounts and shall present financial statements at the regular meetings of the Docent Council and the Board of Representatives. The Treasurer shall annually submit a full financial report to the membership.

(c) Corresponding Secretary: The Corresdponding Secretary shall conduct the general correspondence and shall perform the duties of the Recording Secretary in the absence of the latter.

(d) Recording Secretary: The Recording Secretary shall keep minutes of all meetings of the Board of Representatives and of the Executive Committee, and in the absence of the President and Vice-Presidents shall convene the meeting until a temporary chairman is elected.

Section 5. Vacancies: When a vacancy in the office of the President occurs, the first Vice-President shall perform the duties of the President.

ARTICLE VIII
Election of Department Representatives

Section 1. The election of two (2) Representatives from each Department to serve on the Board of Representatives shall be conducted annually, and the term of office shall be two (2) years. To be eligible for election to the Board of Represantatives, a candidate shall have been a member of the Docent Council for at least one (1) year.

Section 2. Prior to February 1 of each year, a Nominating Committee shall be appointed for each Department, and shall serve for a term of one (1) year. Each committee shall be appointed by the Department Chairman from his Department, as follows: one member from the Board of Representatives, who shall be the Nominating Committee Chairman, and two members from the Department membership at large. Vacancies occurring on the Nominating Committee during the year shall be filled through appointment by the Department Chairman.

Section 3. Immediately after its appointment, each Nominating Committee shall canvass all members of its Department for suggestions for candidates for Representatives, prior to developing a slate of Representatives.

(a) Thereafter, each Nominating Committee shall adopt a slate of candidates to fill the vacancies from its Department existing on the

Board of Representatives and shall designate one of the four Representatives, acting or nominated, to serve as Department Chairman for the ensuing year. Each nominating committee shall also designate one of the three remaining Representatives, Assistant Department Chairman. The Representatives designated as Department Chairman and Assistant Chairman may serve as such for only one year on any two-year term.

(b) Said slate shall be presented to the membership of the Department before April 1.

(c) Said slate shall be automatically elected on July 1, unless written nomination of alternate candidate or candidates is received by the Recording Secretary of the Docent Council within twenty-one (21) days after presentation of the slate. To be valid, such alternate nomination must be signed by the person or persons nominated and by twenty percent (20%) of the active members-in-good-standing of the Department involved.

(d) Should such alternate candidate or candidates be nominated, a ballot clearly setting forth the choices shall be mailed to the Department membership, such ballot to be returned to the Recording Secretary of the Docent Council within ten (10) days. Said ballot shall have been prepared by a committee of six (6) persons consisting of the Nominating Committee and three (3) persons appointed by the alternate candidate or candidates nominated by the procedure set forth in paragraph (c) of this section. Said ballot committee shall receive the ballots and announce the official results of the election.

Section 4. The newly elected Representatives and the Department Chairmen shall assume their duties July 1.

Section 5. Vacancies occurring on the Board of Representatives during the year shall be filled by appointment by the Department Nominating Committee.

ARTICLE IX

Election of President

Section 1. Election of the President of the Docent Council shall be conducted annually. The President shall serve for a term of one (1) year and shall not be eligible for reelection to that office for a period of two (2) years, after completion of that term.

Section 2. To qualify for office, the President shall be a member of the Docent Council, shall have served on the Board of Representatives for at least one year, and shall be chosen from the Natural Sciences Department, History Department, or Art Department, in that order, in succeeding years, so as to assure an orderly rotation of the office among the three Departments of the Docent Council. Should a candidate not be available from the appropriate Department, a candidate (s) from one of the other Departments, in rotation, shall be chosen by the Nominating Committee as provided in Section 3(a) of this ARTICLE IX.

Section 3. The President for the ensuing year shall be elected by the Board of Representatives at its regularly scheduled meeting in February of each year in accordance with the following procedures:

(a) Prior to February 1, a Nominating Committee shall be appointed by the President to nominate the candidate(s) for the office of President of the Docent Council for the ensuing year, as provided in Section 2 of this ARTICLE IX. The Nominating Committee shall consist of one (1) current Board of Representatives member from each Department, plus two (2) members of the Docent Council from the same Department as the candidate(s) for President.

(b) A ballot shall be presented by mail to each member of the Docent Council Board of Representatives and returned to the Recording Secretary so that they are in hand one (1) week prior to the regular February Board meeting.

(c) At said February meeting, the Nominating Committee Chairman shall announce the results. A simple majority of votes cast elects the President.

(d) If there is but a single candidate and this candidate fails to receive a simple majority of affirmative votes, the Nominating Committee shall make every effort to find another candidate from the same Department.

Section 4. The President shall assume the duties of office on July 1, but prior thereto, as President-elect, shall be a member-at-large on the Executive Committee.

ARTICLE X
Committees

Section 1. The Standing Committees of the OAKLAND MUSEUM DOCENT COUNCIL shall be as follows:

An Executive Committee
A Nominating Committee for each of the three Departments
A Recruitment and Training Committee and
A Finance Committee

Section 2. Special Committees shall be appointed by the President with the approval of the Board of Represantatives wich shall designate their powers and the term of the appointment.

Section 3. The Executive Committee shall consist of the President, the Treasurer, the Department Chairmen, the Recording Secretary, and such other members of the Board of Representatives as the President may appoint. It shall be the responsibility of the Executive Committee to provide leadership to plan the agenda of the Board meetings and to make recommendations to the Board of Representatives. The Executive Committee shall meet prior to each Board of Represantatives meeting and at other times as necessary.

Section 4. The Finance Committee shall be appointed by the Executive Committee of the Board of Representatives and shall consist of a member from each Department of the Docent Council, one of whom shall be the Treasurer of the Docent Council who shall serve as chairman of this committee. This committee shall function as provided in ARTICLE XI of these Bylaws.

ARTICLE XI
Funds

Section 1. The Board of Representatives shall administer the annual budget of the Docent Council assisted by the Finance Committee. This Committee shall also work in cooperation with the Finance Committee of the Oakland Museum Association in the preparation of the annual budget of the Docent Council and review said budget with the Board of Representatives.

Section 2. The OAKLAND MUSEUM DOCENT COUNCIL may charge fees for educational programs and accept contributions as approved by the Board of Representatives, but may not engage in fund raising activities. Monies received shall be used for the administration and development of the Oakland Museum Docent Council and for Docent programs. The Finance Committee shall make recommendations as to the use of all monies received by the Docent Council, taking into consideration the donor's purpose in the expenditure of the contribution.

Section 3. All fees and donations deriving from any Docent Council activity shall be deposited with the Oakland Museum Association to the Docent Council account, and shall not be expended without the prior written approval of two individuals authorized by the Docent Council Board of Representatives.

Section 4. The fiscal year of the Docent Council shall begin July 1 and end June 30 to coincide with the annual year of the Oakland Museum Association.

ARTICLE XII
Parliamentary Procedure

Section 1. All matters specified in these Bylaws shall be governed as set forth in STANDARD CODE OF PARLIAMENTARY PROCEDURE, by Alice Sturgis.

ARTICLE XIII
Ammendments

Section 1. Amendments to these Bylaws may be initiated and proposed by any member of the Docent Council. These Bylaws may be amended or repealed and new Bylaws adopted at any meeting of the Board of Representatives by an affirmative vote of at least nine (9) members provided that the proposed amendment was read at the previous regular or special meeting of the Board. Any such amendment shall have the approval of the Board of Directors of the Oakland Museum Association.

Section 2. These Bylaws and any amendments thereto shall be available to each member of the OAKLAND MUSEUM DOCENT COUNCIL.

OAKLAND MUSEUM DOCENT COUNCIL

STANDING RULES

PURPOSE

1. All decisions of the Docent Council are to strengthen the Council as a total, rather than to separate the Departments into three groups.

2. The Docent Council is not primarily a fund raising organization.

MEMBERSHIP

1. All associate members shall be assessed an annual fee of $20.00, payable to the Oakland Museum Docent Council

2. Docent membership in the Oakland Museum Association is encouraged and presumed.

3. A docent returning from resigned status may return only to active status.

DOCENT TRAINING AND RECRUITMENT

1. Uniform fees for all three Departments sufficient to cover the cost of training shall be charged to trainees.

2. A separate account shall be established for training fees.

3. Decisions on expenditures of training fees shall be made by the Docent Council in consultation with the Curators involved.

4. Scholarships shall be offered to those in need, as in the past.

5. Training course curricula shall be determined by the Docent Council in consultation with the Curators of each Department and the Museum Administration.

6. The Docent Council and the Museum shall sponsor only Museum training.

7. The docent program shall be open to all interested and qualified applicants. In order to become graduate docents, they must achieve a certain level of competency during the specified training period.

8. Auditing of training programs by docents in other Departments in permissible providing the Curators agree to it.

9. Mandatory additional training shall be required as the Curators determine, and the Curators and Department representatives shall be responsible for the enrichment program in their Departments.

10. Docents with two years of active service may apply for special training, such as Total Communication. At the discretion of the Depart-

ment Chairman the docent may be excused from gallery duty for a period of up to six months, provided training requirements for new exhibits in that Department are met.

COMMITTEES

1. A list of Board Committees and their function and structure shall be made available to the Docent Council.

2. A committee appointed by the Docent Council president shall review these Standing Rules annually.

OFFICERS

1. An annual report submitted to the president of the Docent Council shall be required from each officer and Board Committee chairman.

2. As requested by the director of the Museum, the Curator, Department Chairman and the Guild Chairman of each Department shall work together on related events of the Department.

FUNDS

1. The Docent Council may charge reservation fees for groups outside of Oakland.

6/75

TRAINING

Tips on training volunteers appear in many sections of this sourcebook; you will find them under Handbooks, Thinking It Through and Evaluation for example. In this section we present two models: one taken from outside the museum profession, but containing processes that can be transposed to the museum context; the other exerpted from a training manual, developed by a museum volunteer organization, employing a number of contemporary strategies from the social sciences. Both programs are presented in booklet form, and are available at a nominal cost from their developers.

Training volunteers for any duties within the museum should begin with an analysis of the skills that each volunteer has, the skills that are needed for the task, the most effective methods of teaching the skills and of providing practice in using them, and a clear definition of how to recognize that the level of skill has been reached. Elsewhere in this sourcebook (for instance in the sections Handbooks and In Brief) you will find details on the length, the intensity and the format that a number of museums use for training. Variations in these details, however, do not particularly correspond to any variation in the quality of volunteer performance. Knowing how to train is more crucial than knowing how many hours, how much assigned reading, how many meetings are considered the "the norm." This section concentrates, therefore, on the skills the trainer will need in order to proceed with any format, and any subject matter.

In this section you will find:

--Training Student Volunteers, developed by ACTION, National Student Volunteer Program, and

--A Personal Training Program for Docents, developed by Professor Lawrence F. Lowery for the Oakland Museum Docent Council.

Training Student Volunteers

The following material is excerpted from the first two sections of Training Student Volunteers, a publication of ACTION, National Student Volunteer Program, 806 Connecticut Avenue, N.W., Washington, D.C. 20525. Other sections of this useful manual include "Techniques: How to Use Them" (these are graduated by difficulty and include suggestions for each of the components of a training program) "What is Training?", "Who is a Trainer?", a bibliography, and a section on "Evaluation" included elsewhere in this sourcebook. The manual is free, and can be obtained from the above address. You will note that it was designed to train a particular group (students) for a variety of social services, and that it will be necessary for you to make some modification to suit your own setting. The Center's introduction to this manual was through a museum educator who uses it and endorses its methods.

ACTION
NATIONAL STUDENT VOLUNTEER PROGRAM
806 Connecticut Avenue, N.W.
Washington, D.C. 20525

ACTION'S NATIONAL STUDENT VOLUNTEER PROGRAM

The student volunteer movement has grown dramatically in the past few years. Today approximately 425,000 college students serve as part-time volunteers in local, independent programs at some 2,000 colleges and universities, while the movement among high schools to sponsor service-learning programs is ever-growing.

The National Student Volunteer Program (NSVP), a part of ACTION's Technical Assistance, Training and NSVP Branch, exists to see that student volunteer programs on high school and college campuses across the country continue to thrive while increasing their quality. NSVP is a supportive program -- an information and assistance source. It has no authority over local program activities and does not grant operating funds.

NSVP's services for student volunteer programs consist of technical assistance materials, training and on-site consultation. These services are described below, and are available without charge.

> TECHNICAL ASSISTANCE MATERIALS that are available include "how-to" manuals, journals, case studies and resource bibliographies. (See back of this page for a complete list of NSVP's publications.)
>
> TRAINING sessions for teachers and administrators working with high school service-learning programs and professional staff and leadership of college service-learning programs are held periodically during the school year. These sessions are designed to assist staff in planning and managing programs that integrate students into community service activities.
>
> ON-SITE CONSULTATION is available to programs in need of direct assistance. It is also offered to groups sponsoring conferences or workshops on various aspects of student volunteer programming.

If NSVP can help you in any way,

WRITE: ACTION/NSVP
806 Connecticut Avenue, N.W., Room 1106
Washington, D.C. 20525

CALL: (202) 254-8370 -- In Washington, D.C. area
(800) 424-8580 -- ACTION's toll-free number, ask for NSVP on extension 88 or 89

SECTION I

DESIGN: NEED ASSESSMENT & ESTABLISHING OBJECTIVES

This section will help you learn how to design training programs. Like most beginning trainers you're probably more anxious about techniques and methods than you are about design. Ok. Go to the Techniques Section first, and look at it if you like. But come back. Techniques are great if you have a goal but not much help without one.

Designing is putting it all together. We'd like to share a seven-step design process with you:

1. Assess Needs
2. Establish General Learning Objectives
3. Establish Definitive Learning Objectives
4. Set a Climate for Learning
5. Agree on Goals for Learning
6. Conduct Learning Events
7. Evaluate Accomplishments

Of the seven steps, the first three are done before the training event actually begins. Steps 4 and 5 are the very first steps taken when you meet your group. Step 6 is the biggest, and step 7 caps it off.

Prior to convening the group of learners	1. Assess Needs 2. Establish General Learning Objectives 3. Establish Definitive Learning Objectives
When the group gets together	4. Set a Climate for Learning (Greeting and Welcome) 5. Agree on Learning Goals Checking with participants to see whether or not the general learning objectives fit their needs 6. Conduct Learning Events--exercises, projects, lectures. This is where the Definitive Learning Objectives come alive.
At the end of a learning event	7. Evaluate Accomplishments. Check to see what has been accomplished and what else needs to be done

READY?

We'll begin with assessing needs and setting objectives, but before we do, let's try to put design in some sort of context. A design is really a recipe--a recipe for the sort of stew you're going to concoct. It should have a pinch of this and a dash of that. But, of course, you must have the basics, and that is what you will find in this manual. Then you can make it as spicy and as complex as you want or need to.

The seven steps are a checklist. The steps are, of course, linear. This manual begins with step 1 and goes right straight through. However, a linear progression is not necessary, and most people don't create designs in a linear way. Some start by thinking of methods; others start with objectives. No matter where you begin, all the basic ingredients have to be included sometime before the recipe is complete.

Some designs are informal and simple. For example, for an hour training session, do you need twenty pages of plans? Scarcely. But you do need to know what you want to happen even if the design is all in your head.

NEEDS ASSESSMENT

What do you need? If you ask for something you need in a drug or hardware store, this question makes sense and gets results. Most of us find it pretty simple to describe our material needs. But suppose a doctor, a lawyer, or a psychiatrist asked you what you need? You'd find it difficult to answer. How do we know what we need? That's what we hire professionals for. We depend on them for diagnostic assistance. This applies to trainers as well. Professionals are not clairvoyant. They need a great deal of information from their clients. How the professional asks for the information is the key. For example, it usually isn't productive for a trainer to come right out and ask the volunteer what his training needs are. Often, the answer is that the needs are beyond counting--which is a dramatic reply but not a very useful one. So we suggest that when you begin a needs diagnosis prior to training, begin with problems. Problems are easier for people to talk about and usually a lot clearer than needs. Moreover, if you can talk about problems rather than training needs, you get a glimpse of the situation at the level that permits you to make a professional judgment as to whether or not training is needed. For example, if the volunteer tells you he needs a series of sensitivity training sessions, he has offered you a training solution. But, to know whether that solution is sound, you must know more about his problems.

A training need is the description of the kind of training or re-education required if volunteers are to solve problems they can't presently solve with the skills they have. So, what you do first is ask: "What sort of problems will volunteers meet that they'll be expected to solve?" With that information you'll be able to say, "The training they need to solve that problem is the skill to do A, B, & C and knowledge about D, E, & F."

Need assessment is not difficult. There are, however, some guidelines and thoughts to keep in mind--and practice helps a lot.

The name of the game is first to identify problems and then translate them into learning needs--if learning will solve the problem. Sometimes it won't. Often some other intervention is called for, perhaps an administrative change, an infusion of cash, or additional staff. For example, if one of your projects is a hot line, you wouldn't suggest training if the real problem is a lack of phones. Training won't solve everything, particularly lack of money, insufficient space, or poor public relations.

Look at the problem and then ask yourself whether training will help solve it. Suppose the problem is to establish a tutoring program for Indian children. Will training help? Partly. First you must get some volunteers. After that, you'll need to provide training in (1) tutoring and, (2) cross cultural communications. Notice that part of the problem is recruiting and part of it is logistical. Training alone won't do the job. The training component is only a part of the whole.

So far, so good. You've looked at a problem and identified at least one training component. How do you then translate a problem into a training need? Look at the last example again.

Problem: You have some volunteers but they don't know how to tutor Indian children.

Training need: ____________________________________

You're right; volunteers need to learn how to tutor. You've identified a skill volunteers will need to learn and in so doing have described a training need. Try another.

Problem: Your volunteers have never worked with Indian people and know nothing of their culture.

Training need: ____________________________________

If you said volunteers need to learn to appreciate the history and value of the Indian culture, you're right. And that is how you translate a problem into a training need: Identify knowledge, skills, and attitudes that people need and can learn and use to solve known problems.

For the most part, you will train volunteers for projects you know well. The training needs are obvious and require little data gathering and analysis. If you are recruiting and training volunteers to work on a hot line, trainees will need information about drugs, sources of referral, and a smattering of consultation and counseling skills. Most projects also require orientation. Work in correctional institutions, with the handicapped, or in hospitals represent a culture displacement for volunteers, and most will need a chance to get accustomed to their new environment. As you can see, it isn't difficult to discover or infer training needs. Besides, you're much more familiar with your own organization than anyone else and probably already have a good sense of what's required.

But suppose you don't know. Who do you ask? How do you get the information?

Go first of all to the people with whom the volunteers will work and ask what volunteers will be expected to do; how they will be expected to act. Check with the volunteers themselves when the time comes. Ask others who have been involved in the same program. Ask service recipients how a competent volunteer should act. Get help from people on campus who do training. Get as many people involved in need assessment as you can. One caution, however. Don't go on forever assessing needs just as if you had to know everything before going on to the next step. That isn't necessary. Begin training as soon as you can and begin with the most immediate need.

Learning Domains

One of the biggest factors in needs assessment is the ability to tell what learning domain a problem falls within. A learning domain is simply a handy category. There are three that are generally used and cover most contingencies.

They are:

- *Cognitive Domain*
- *Skill or Motoric Domain*
- *Affective Domain*

The cognitive domain covers the intellectual sphere. It includes analysis, synthesis, knowledge acquisition, memory, facts, rationales, and systematic philosophy. Training designed to increase knowledge or intellectual acuity is in the cognitive domain.

The skill or motoric domain relates to operations people perform to accomplish tasks. Counseling is a skill. A complicated one, but nevertheless a skill. Tutoring in reading is a skill. Managing a re-cycling center is a skill. All require brains and a cognitive base, but the dominant component of the operation is in the skill domain.

The affective domain includes values, feelings, and attitudes. Racial encounter groups designed to change attitudes and feelings are examples of affective training. Sessions in which volunteers share their feelings and reflect upon them for depth of insight are affective in nature.

We'll use these terms again when discussing objective setting. For the present, try to think of problems in terms of learning domains. The reason for doing so is that training needs must conform to the domains of the problem. If the problem revolves around poor attitudes, don't develop a training program that provides information about attitudes. Develop one in which people have a chance to actually express their attitudes and assess the consequences of having attitudes such as a racial bias. Or, if you want people to learn a skill, provide a training program that gives participants a chance to practice the skill. The point is to avoid setting up a lecture series to change attitudes, sensitivity groups to teach tutoring skills, or practice sessions to offer knowledge. Try putting the following into their proper learning domain.

1. History of a culture is in the _______________ domain
2. Typing is in the __________________ domain
3. Empathy with a minority is in the ______________ domain
4. Interviewing is in the _________________ domain
5. Frustrations generated because plans are not working well is in the ________________ domain

Answers:

1. Cognitive. This is information; head work.

2. Skill. Typing is essentially a motor skill; body and hand work.

3. Affective. Empathy is an emotional response; a feeling.

4. Skill. This is a little harder because interviewing is also partly cognitive. But, the dominant domain is skill; doing something with the body (and the mouth in this example).

5. Affective. Feelings are not rational. They're simply there and need to be taken into consideration.

How are you doing? We'll treat this again later, so don't worry too much about it if you're having trouble. Remember, the domains are simply handy categories.

Right now, think of need assessment as a necessary but relatively simple task. Before we leave the subject, let's see what you can do to make an assessment more accurate.

What You Can Do To Increase the Accuracy of Needs Assessment For Training

- Define the problem: Is it that people need tutoring skills or need a bus to transport tutors? Or both?
- List new skills, knowledge, and feelings that would solve the problem: tutoring skills, knowledge of the role volunteers are expected to perform, high degree of empathy with people, etc.
- Identify behavior for which people can be trained: teach children, listen, interview, initiate contacts with strangers, give information over the phone, and manage a budget.
- Categorize behaviors by learning domain.
- List training you know how to do.
- List training you aren't qualified to handle.
- Get others involved in the assessment, particularly volunteers themselves.
- Recognize the limitations of training. It can't solve every problem.

What You Can Do To Botch a Needs Assessment for Training:

- Not make one.
- Look at the world solely in terms of the kind of training you're personally capable of doing.
- Make the assumption that training can solve the problem.
- Not have a clear idea of what you can do.
- Not define the problem.
- Not involve others.

Some Signs that Will Tell You the Need Assessment Was Incomplete

- You haven't the foggiest notion where to begin.
- Participants keep asking, "What are we doing this for?"
- You can't write any objectives . . . or even think of any.
- The learning domains aren't clear to you and others.
- You spend a long time looking at your shoes when someone else asks you what needs your training program will fulfill.

The following examples may be used to test your ability to ferret out training needs. Use them if you like.

ESTABLISHING OBJECTIVES

The volunteer's needs and problems are numerous and only some of them, perhaps very few, are open to training solutions. Even those that are training problems can't all be handled at once. So, your first task is to make a selection. Somewhere in that pile of needs there are some you can and should handle. Zero in on those and make a selection you can deal with. Don't worry about those you can't handle.

Make a selection and begin training as soon as you reasonably can. Not only will more problems surface as you go along, but your work will affect the very shape of the problems and the training environment. It happens both ways. Besides, a training session is often the best way to get at training needs. The climate is right for people to share training inadequacies they wouldn't dream of sharing in other, less secure circumstances.

Once your training selection is made, you are ready to decide on what we call a *General Learning Objective (GLO)*. A GLO is a statement of the problem in training terms.

This GLO must relate directly to the problem. You have to select a problem that is well within your capabilities and express it in a way that clarifies the learning component.

Here is the way it might be expressed:

NEED

To provide trained volunteers who can teach visitors about the museum's collections. *

GENERAL LEARNING OBJECTIVE

To train volunteers in the "inquiry" method of teaching. *

*Editor's note: in order to provide some clarity in this section of the ACTION manual, we have deleted their examples, and added our own.

Now you have a General Learning Objective (GLO); but it is general--vague. The next step is to clarify and define this area you have decided to concentrate on.

Definitive Learning Objectives

You do need *Definitive Learning Objectives (DLO's)* and until you get them, you can't design a training program that's very specific. A Defintive Learning Objective is the final and most essential step in the process of setting objectives for training. The DLO is a specific, concrete, identifiable training objective directly related to the General Learning Objective. A DLO is to the General Learning Objective what individual plays are to a football game. They are complete; each is a distinct unit, and together, in a variety of combinations, DLO's move toward resolving the General Learning Objective.

NEED

To provide trained volunteers who can teach visitors about the museum's collections.

GENERAL LEARNING OBJECTIVES

To train volunteers in the "inquiry" method of teaching.

DEFINITIVE LEARNING OBJECTIVE

To have volunteers give accurate examples of "open-ended" questions without consulting notes or other aides.

Does one DLO accomplish the whole General Learning Objective? No. But you need several DLO's put together in appropriate sequences to accomplish your General Learning Objective. What we've been talking about is a process by which large, amorphous problems can be whittled down to manageable units of training.

Criteria for Writing Definitive Learning Objectives

Care to dissect a DLO and see what makes it tick? There are three criteria that make a DLO what it is. The criteria are:

1. The objective must be observable or measurable
2. The level of acceptable performance must be specified
3. All the important conditions for performance must be listed

Measurability

Is our selected DLO measurable by ruler? A measuring spoon? A stop-watch? No, it isn't. The measure is:

. . . A LIST

LIST is the key word. That is how you measure whether or not participants have learned anything. We ask them to do something; to engage in some kind of behavior that is clear to everyone--in this case, giving accurate examples of a type of question. That's what measurability is all about. Call it what you want; measurable, behavioral, observable . . . the result is the same. Participants must be able to do something they couldn't have done prior to your training--list, write, recite, enumerate, separate, record, demonstrate--all measurable, do-something verbs. Not general, less measurable verbs like appreciate, or contemplate. That's the clue to whether or not a DLO is in the works--the verbs, and whether they express actions that can be measured easily and directly.

Test yourself. Place a mark in front of the measurable objectives.

1. Participants will know the history of the docent council .
2. Participants will record the kinds of questions they hear being asked on a sample tour.
3. Participants will write sample questions that they might use for one object in the collection.
4. Participants will really understand the role of a museum volunteer.

If you checked number 1 or 4, you're wrong. Neither you nor anyone else can measure "knowing" or "understanding" just by themselves, and "really understanding" doesn't make it any clearer. If you want to measure knowledge, you will discover yourself asking people to write, recite, or list, something to demonstrate their knowledge. So why not start that way and not bother with the vague verbs at all? Make life easy for yourself.

Level of Acceptable Performance

If you write a Definitive Learning Objective related to helping someone run the 100-yd. dash, is it safe to assume that you would give him four hours to run it? No. An Acceptable Level of Performance is that the dash be run in 9 to 14 seconds. DLO's should have a clear statement of the level of performance participants will be able to demonstrate after training.

The importance of this criterion is that it helps the trainer focus on his design and training methods. If he wants a very high level of performance, he will have to provide time, practice forms, and a variety of designs to reinforce the material.

Conditions

In a good DLO, the conditions under which the learner will perform are noted. In our original DLO example the conditions were expressed as ". . . without notes or other aids."

Why bother? Because it helps the trainer select techniques and methods to accomplish the training. Also, as with the Level of Acceptable Performance, some design directions are indicated by conditions. For example, conditions are often positive, or plus conditions, such as working with a partner, or a group, or using books and notes as aids and guides. If you think of those conditions beforehand, you have some idea of the kinds of learning exercises to provide. A plus condition in our example would allow the participants the privilege of using their notes. What we have written is a minus condition; pupils are not permitted any aid other than their own memory.

To summarize, the criteria for a Definitive Learning Objective are:

1. Measurability
2. Level of Acceptable Performance
3. Conditions--plus or minus

Skills--The Motoric Domain

So far we have been talking mostly about acquiring new information. You may be thinking, "OK. But there's more to training than listing and reciting." There is; a whole lot more. One item is the entire domain of skill acquisition. Just because you can repeat information doesn't mean you can do anything with it. Sure. You can list ways to improve communication; but putting those ways into practice is another story. Or more to the point, it needs another DLO.

A good part of all training helps people acquire new skills or polish old ones. If Definitive Learning Objectives are of any value, they should be applicable to skills training.

Let's look at examples.

- Participants will be able to type 80 words per minute with no more than four errors.

- Participants will be able to role-play a 15-minute interview. The quality of the performance will be judged by the trainer and other participants according to the principles of interviewing discussed and demonstrated during the training session. Participants will be permitted to use notes.

- Participants will demonstrate the ability to use a 16 mm sound projector. The demonstration will be successful if the participant threads the film so that the picture and sound are synchronized. The projector will be supplied by the trainer.

May we offer a hint? If you're having trouble writing DLO's, write them in a shorthand way first. Put down some words and phrases that capture the essence of what you want. Polish and perfect later. This avoids having to write a perfect DLO from beginning to end right off, a tough task and not very much fun. Please don't let yourself get pushed around by this system. A DLO is just a tool, after all.

Here's an example of what we mean by shorthand. Suppose one wants to help people with interviewing skills. The shorthand notes for the role play interview example might have started out like this:

Measurability: Demonstrate interview system in 10 minute role play?

Acceptable Performance: Our judgment confirmed by rest of participants?

Conditions: No notes! Just like real thing--without a coach.

Sometimes that's all the writing that may be necessary. Other times a more polished DLO is needed. Either way is all right.

Feelings, Values, and Attitudes

"I know the principles of good counseling, and I can use all the techniques. But I don't like drug addicts. They drive me up a wall. I'd rather not talk to them."

Now what? You just trained a person to do a technically competent job. He has the knowledge and the skills he needs. But he still can't be a hot line volunteer. You've now got a training task in what is in the *Affective* area of human activity. The affective area covers feelings, values, and attitudes. Can you write a training design to help? Yes, and the objectives can be measurable, but writing DLO's in the affective domain is difficult. The problem is that you can't see an attitude or a feeling change. All you can do is look for secondary behaviors and infer changes in values, feelings, or attitudes. Let's try one:

--Participants will evidence an attitude change about drug addicts by exhibiting some of the following behaviors:

- making unsolicited comments like, "Good grief! I didn't even see that before!"
- consciously expurgating sensitive phrases and humor about addicts from their conversations
- candidly discussing their own shortcomings in terms of attitudes, rather than saying, "Some people think . . . "

The above behaviors must take place without the trainer suggesting change or programming the volunteers. Setting objectives in the affective area is an imprecise art at best and is the most difficult to work with. One needs all the DLO criteria to work in this very sensitive area, especially the conditions like making sure comments are unsolicited. Even though the affective domain is delicate, affective dynamics are present in every training session and are of immense importance.

One more hint. Here is a simple formula for writing DLO's in the affective domain:

1. First state the area of the affective domain you are training in.

   Example: At the end of training session involving role play, participants will evidence their increased confidence in . . .

2. Then list a series of behaviors that tend to indicate their increased confidence.

   Example: Saying--"I think I can do it."
   "I'm ready to try a real one."
   "That wasn't so bad."
   etc.

3. Then put in any conditions that might be necessary.

   "Without group pressure to make positive statements and demonstrate a willingness to accept failures as well as successes.

THE DEEP END: FOR YOUR CONTINUED READING

Miles, Matthew B., Learning to Work in Groups, New York: Teachers College Press, 1959.
A thoroughly readable book and probably the best single reference in the field.

Bloom, Benjamin S. (ed.), Taxonomy of Educational Objectives, Handbook: Cognitive Domain, New York: David McKay Co.
A complete treatment of the theory of cognitive domain and sequence in which the domain is developed.

Knowles, Malcolm S., The Modern Practice of Adult Education, New York: Association Press, 1970.
An interesting and detailed account of modern adult education principles.

Krathwohl, David (ed.), Taxonomy of Educational Objectives, Handbook II; Affective Domain, New York: David McKay Co., 1964.
A complete treatment of the theory of affective domain and sequence in which the domain is developed. Heavy reading.

Mager, Robert F., Preparing Instructional Objectives, Belmont, Calif.: Fearon Publishers, 1962.
This book is a programmed learning text for writing DLO's--except in the affective domain. It's a well written book and fun to use.

SECTION II

DESIGN: PUTTING IT ALL TOGETHER

Right now here's where we hope you are:

> You know how to make a Needs Assessment--to define a training need...
>
> Can translate it into a...
>
> *General Learning Objective (GLO)*
>
> and then write...
>
> *Definitive Learning Objectives (DLO's)*
> that give active meaning to the GLO.

Now what?

So far, you know what the volunteers ought to be able to do after training. But you haven't got a group together yet nor do you have any methods. So first things first. Let's talk about groups and group characteristics, then on to climate setting and goal agreement.

The Care and Feeding of Groups

By a group we mean six or more people. Size makes a noticeable difference in terms of the rate of progress. A small group can move faster than a large one. The slow rate of larger groups is due almost entirely to management rather than learning functions, especially when using participative learning techniques. It simply takes time to move people from here to there, get them organized and get out the information. Climate setting takes more time and more skill. Larger groups tend to be impersonal, and it's more difficult to warm them up. Sometimes the combination of slow-down phenomena in a large group creates an atmosphere of heaviness and snail-like movement for almost everyone, and you're likely to hear the complaint, "We're moving too slow."

You can do a variety of things to liven the pace: (1) create smaller task groups that can work independently; (2) actually move faster through the material; (3) create a climate of briskness by starting and stopping on time and reducing time required to generalize; and (4) putting up a schedule so people can see how far they've come and what they must do to finish. Unfortunately, a learning group is somewhat like a stream of traffic. One slow person can hold everyone back. That's one of the problems of group work that learners and trainers both have to live with.

Data flow in large groups is more intricate and takes more time to figure out. It's hard to know what the group thinks. There are too many feelings, too many informal alliances, for you to be able to read the situation quickly. As a result, you have to work harder to maintain control.

The advantage of a large group is mainly that of resources. There are more people to work with, and more interactions and perspectives are possible. But a trainer must be skilled at orchestrating to make use of these advantages.

A small group is limited to a lesser variety of innovations because everyone ends up doing every exercise. The result is a chorus-line effect. Moreover, the trainer is limited to a rap style as against a more forceful, dramatic style. You can't make much of a pitch to six or seven people.

Small groups offer limited human interaction. People get to know one another up to their chosen limits rather rapidly. Then there's no one else to engage, a certain edge is gone, and the vitality is difficult to maintain.

A trainer energizes a group. He doesn't motivate it. Learners come with their own motives, but the group leader sets the pace or the beat. He determines whether it will be ragtime or requiem, and he has a major responsibility in maintaining and managing the energy output of a group. Style makes a significant difference in this context. Some people brim with energy and work a group up very rapidly; the pace is fast, intense, and powerful. Others start slowly, build a solid web of trust, and don't reach full power until much later.

Your style will determine how you'll energize a group. If you're thoughtful, thorough, articulate and concerned, the group will reflect that style and respond by releasing energy in similar or complementary ways. It's important to remember, whatever your style, that you're setting the style and the group is responding...unless of course, it becomes the classic and well-studied mob. Then you leave by the nearest exit.

Lateness and Absence

In terms of group discipline, one yearns for the era of the mace and leg irons. But if one takes adults seriously, it is important to avoid punishing with childish disciplinary measures--which don't work anyway. You must try to build a group consciousness instead.

Lateness, unexplained absences, and like behaviors drain an incredible amount of energy from a group and cannot, over the long run, be allowed to destroy it. You cannot stand meekly by and watch the process without abdicating your responsiblity. Your responsibility is to help the group control itself. What you can and should do is make the consequences of retarding behaviors clear and give people the opportunity to set group norms that all agree to. You must also take some (but not all) of the responsibility for enforcing the norms. Suppose, for example, punctuality is initially agreed upon as a group norm, but it doesn't happen. Our response is not to punish individual latecomers but to raise lateness in general as an issue at a propitious time. "We agreed to punctuality. It isn't happening. What do you choose to do about it? We can forget it, but if we do, X, Y, and Z are the consequences. Or, we can change our behavior according to the norm. Let me know and I'll be here when you rally want to meet. But it would be helpful if we didn't game each other about this."

When people are unaccountably absent, everyone else wonders why. To our knowledge the only exception is in large, formal gatherings where reliance upon others in the group is neither sought nor encouraged. Anytime a member of a group wants to learn from others and interact, absence is both noticeable and a problem. Mechanically, the group isn't running on all cylinders and is weaker as a consequence. That's a fact. All must be working to avoid the power loss, and it's a group leader's task to raise the absence issue when it is a problem. An integrated interdependent learning group is more like a dinner party than a casual cocktail party. It isn't an in-and-out affair. If you want an in-and-out group, then by all means build one. They are perfectly legitimate. But if that isn't what you had in mind, and yet you get one, you've got to face the issue and get group agreement. You can help by making your own expectations clear in the beginning; not that they will be normative, but that they will be public.

Dawdling--War Stories

A War Story is a term used to describe narratives people sometimes launch into about their own accomplishments, their own projects, and their own experiences. "Well, now. I can remember when that happened to me and..." *Ad Nauseum*. War Stories are bids for membership and, as such, are understandable and even useful up to a point. Most of us have engaged in the process at one time or another. It's a way of saying, "Here I am." There is, however, a point of diminishing returns, and it is reached very rapidly. The difficulty with War Stories is that they aren't involving. Only the narrator has had the experience. For everyone else it's vicarious. Occasionally an excellent story teller can enthrall a group, but Mark Twains are rare.

Your responsibility is to manage the War Story Syndrome. You don't want to stop it because if you do you will deny individuals an entry mechanism that may be the only one they really have. On the other hand, you can't let the War Story be the primary medium by which the group gathers and processes data and content. Avoid the dilemma by providing a place for War Stories in the climate setting phase. Let people feel their way into the group. Later, when you begin sharing goals and expectations, describe the effects of War Stories and point out their liabilities. On this basis you can take responsibility for monitoring them, and ask others to do the same. If, however, one or two people don't hear the message and continue to recount the story of their lives, intervene. Simply ask if they would like to speak to data common to the group or state that the narrative doesn't appear to concern most of the others.

So much for the care and feeding of groups.

Climate Setting

What is climate setting, and why do you need it in a training design? Climate setting is really a greeting like saying "Good morning or Welcome." One could take it for granted were it not for the fact that adults have self-images of independence and are often suspicious of schooling and training. They don't always feel comfortable in groups, and initial meetings are edgy. Edgy people don't learn well. So, prior to the beginning of training, participants must feel comfortable and get adjusted to their environment.

Climate setting indicates the tone of the experience to follow. Some tones are cordial, others aren't.Consider Marine Corps

Boot Camp. How's that for setting a tone? Regardless of opinions about that tone, it is set--and in precisely the manner intended. In the training you'll be doing, the volunteers themselves are the greatest learning resources, so you'll want to develop a climate of trust and openness -- the exact opposite of Boot Camp. Don't bellow.

Climate setting addresses three general concerns of learning groups:

- °*Trust*
- °*Membership*
- °*Expectations*

Trust

Dialogue is impossible without trust. Participants need to develop trust in you, trust in their peers, trust in themselves. Turst is developed when people concretely and truthfully show their intentions. If actions don't correspond with words, there's no evidence of intention and therefore no trust. If you say you expect learners to act like adults, then proceed to bleat at them and manipulate them as if they were children, trust will not develop. The climate will be one of Gamesmanship. People will play social games with you and others to mask their unwillingness to enagage in encounter and dialogue.

Trust should be consciously developed rather than left to chance. Trainers use devices to initiate trust and relationship issues before leaping headlong into content. At a social level, these devices are called icebreakers. Their function is to enable everyone to initiate a sufficient number of probes to test the quality, genuineness, and authenticity of the group. We have included a couple of those devices in the Techniques Section. Look at them now on pages 61-67, if you like.

There is no such thing as the one right climate for all occasions. If you are conducting a task workshop, you'll want to set a working climate as opposed to a discussion climate. Choose a climate compatible with the objectives. There are some universal qualities, however. You'll want to set a climate in which each participant becomes aware of his own uniqueness and where the relationship between the trainee and the trainer is cordial, open, and supportive. In addition, physical arrangements should be as comfortable as possible. They should reflect the idea that adults learn best in convenient, informal surroundings.

Climate setting can begin before the group is convened. For example, mail out a brochure or pamphlet written in such a way as to set the tone of the training session--breezy or serious. Pre-involvement instruments, like a learning needs assessment, also may be distributed. They engage the participant in planning for his own learning by asking him to set forth his goals and objectives, or they pique his interest with a statement, a question, or even a case.

Don't rely on pre-involvement instruments to fully explain the purposes of the training. You'll need to do more when the group convenes.

The first session is the most critical one. If a positive climate is established then, the remainder of the training will be greatly benefitted. There are several climate-setting events in the first session: greeting, introductions, and trainer-trainee relationship building.

Occasionally there is the chance to have a short cocktail party, coffee hour, or similar social event prior to training. This gives the student volunteers a chance to meet with trainers and co-participants on an informal and non-threatening basis. The atmosphere is congenial and informal.

Some training sessions are so short that pre-training social events are not feasible. Then introductions if needed, may begin the session. If a group is small, everyone may introduce himself, or a pair may introduce one another, giving background information suggested by the group. If there is a large group, it can be reduced to small sub-groups for purposes of personal introduction. Everyone should be given an opportunity to make his own name known. Nothing is so embarrassing as calling someone "whatchername" after four days together.

Greetings should convey warmth and respect. Participants who see themselves as valued group members are well on the way to sharing their own unique insights and skills. A cordial, informal welcome reflects the adult's image of himself as a valuable and interesting human being. A trainer need not flit from person to person with the glad hand; that's a shade plastic, but he can start the procedure and then enlist the help of others.

If you want to reduce the formal overtones usually associated with learning situations, informal dress helps. Simply dress as you would for an informal gathering in your home.

Introduce helpful information about logistics and administrative matters early. Give participants an opportunity to ask questions about topics you may have overlooked--facts they may need to know to be comfortable. That way they begin the process of owning the training themselves. Your early use of participant resources will strongly demonstrate behavior compatible with adult education principles. Right at the beginning of a training event people get a clear idea of the direction their training is heading, the way they will be treated, and how they will be able to contribute.

Trainers have a great deal of power--just as teachers do. You may not be too pleased with that fact, but it's a fact nevertheless. The mantle is culturally vested and not lightly cast off. One of your tasks is to complete a teacher-power transfer from you to the learners. A handy place to begin is during the climate setting phase. Reducing the formality of the session is helpful, and dress is one way. Another way is to encourage people to call you by your first name. Try to use participants' names, too. It will give you a chance to memorize them and create a supportive, friendly atmosphere. Listen carefully to questions and respond appropriately--but say you don't know if you don't. It's terribly important to be open and honest. It's as obvious as all outdoors that belittling participants is poor policy--as is puffing yourself up as supertrainer.

Some questions at the beginning of training are a little on the dumb side. Don't use them as an opportunity to show how swift you are. Participants may laugh, but deep inside they'll know they could get cut, too. They mistrust you as a result. Trust is the most valuable asset the group can create, so trainers should do all they can to help its genesis.

The power transfer is a curious and delicate phenomenon. Early in a training session it's easy for a trainer to get caught in a power dilemma. Participants feel more comfortable with traditionally powerful leadership from a teacher, but they resist it on grounds of adult independence. There are two extremes that ought to be avoided. The first is called the General Patton Syndrome, for want of a worse term. This is the big takeover; the push and pull; bellow and snort. Shape up the troops. The trainer clearly indicates who's boss and presses on at his own pace. Some participants feel secure in the hands of such obviously strong leadership. Most don't, and participation is likely to be low, along with trust. One doesn't have to caricature the part or be ridiculous, but the effect in the same even when a trainer lays down the law with a fist in a velvet glove.

The other extreme is the Dummy Syndrome. The trainer acts like he's just off the boat; he claims no power, no influence, no preferences, nothing. One of his opening gambits may be, "Well, what would you like to do?" A trainee's first impulse is to move toward the trainer with a blunt instrument. A trainer of this sort has a poor notion of what self-directed learning is. His own aimless intellectual sprawl is a hindrance. Trainees didn't convene the session, and they can't be expected to control it. The trainer's abdication leaves them without direction or support. It can be a nightmare.

In between the Patton and Dummy extremes is the trainer who takes initial responsibility for the process of the power transfer and guides it until it is complete by helping people join the group and helping them to offer their ideas and make suggestions. He actively and consciously helps other participate by elicitng responses. He communicates his leadership and the impression that he is able to handle things instead of acting like he doesn't know what's going on.

Initially, the trainer will assume most of the control. He will have a suggested working structure for the body of the workshop in mind, and he will certainly conduct the climate-setting exercises necessary to get the group started. Otherwise, who needs a trainer? If participants were able to convene themselves, build their own teams, diagnose their own needs, plan their own learning actitivities and conduct them, trainers would be about as useful as camels on a freeway.

Membership

Membership is the issue of belonging. It is both a psychological and an intellectual issue. Of the two, the psychological dimension is strongest.

When persons enter groups of any kind, anywhere, they weigh the cost of belonging. In some groups the cost is money, power, prestige; others establish racial norms; still others use manners or conventions. There are literally millions of membership norms. Membership norms can be clearly expressed or it can be assumed that everyone understands. Another way is to have them covertly communicated through games, innuendo, and custom. Assumed or covertly communicated norms are not helpful if the training population is multi-cultured, poor-rich, young-old, black-white, or town-gown.

For example, people who don't have much formal schooling often assume that the cost of belonging to a learning group is either more education, a smarter head, or a larger vocabulary than they possess. As a result, they may respond passively because they perceive themselves as on-lookers--not as bona fide members of the group. Also, everyone wonders what the pecking order is, who is grouped with whom, what games are being played here and there.

Membership norms should be established during climate setting. For example, the trainer can state explicitly what previous experience is appropriate to the group and what different levels of experience are represented. Participants should be encouraged to state their agendas and objectives. The more public information, the better groups are able to function.

The process of establishing secure membership in a group usually persists for almost as long as the group lasts, and it is characterized by occasional ups and downs. It is unreasonable to expect everyone to establish membership at once and consistently maintain it. Some form of belonging must be reached for everyone, however, or learning will be greatly inhibited. Trainers can nurture membership, taking pains to include those who are having difficulty getting involved. This includes talking with them at breaks, encouraging them, and openly revealing any clique forming or social games people sometimes play. Most important, a trainer must be objective and treat everyone with equal respect.

Expectations

You like to know what's expected of you and by whom. Everyone does. Participants want to know what kind of performance will be required of them, what standards they must meet, and what rewards and punishments there are.

In the kind of education we've been discussing, there are some specific expectations. These require explanation because they're unusual for those familiar only with established patterns of education.

It is difficult for a learner to conceive of a learning situation in which he shares responsibility. Therefore, when you indicate your expections of people insofar as responsibility is concerned, you are introducing a new concept. People may intellectually understand what you say, but unless they are experienced self-learners, their behaviors and feelings will tend to flow in the other direction. They will still want you to assume the accustomed teaching role, particularly when the going gets tough. The expectation of self-responsibility must be reaffirmed and reinforced throughout the session. It is one of the most important things an adult can learn. For example, if a volunteer wants you to tell him what he should learn, your task is to lead him into a self-diagnosis process so that he can determine what he wants to learn. If he asks for answers, ask him, "What does it seem like to you?" "How would you get that information if I weren't here?" "Is there anyone here who can respond to that question?" Small groups and participative exercises take the spotlight off the trainer and put it on participants. Don't get trapped into a"telling role" where you do all the talking, all the answering, all the initiating.

There will be other expectations besides having participants responsible for their own learning. For example, you'll have some objectives in mind, objectives the trainee is expected to meet. Make your expectations explicit. It isn't necessary to impose your expectations, but you should make them explicit.

This is one of the most difficult aspects of training. When a group is new, no one knows anyone else, at least not in the role of a group member. Expectations don't really exist except in a general sort of way. One doesn't have expectations of strangers. Expectations blossom when capacities are revealed. If we know you're good at training, we'll expect competent work. If we don't know you at all, we don't have any notion of what to expect, but the longer we're together, the greater our expectations of you will become.

When a group first meets, the trainer expects the participants to get with it, and the participants expect the trainer to go to work. Those participants who are indoctrinated with the conventional teaching model want the trainer to set forth his expectations in a clear and logical fashion. They expect him to tell them what to learn. If this were done, trainer expectations would end up by becoming those of the participants without any attempt to determine their own needs.

There have been a lot of experiments with ways to help participants articulate their expectations.

This worksheet is one way. The example is an instrumented technique (written diagnosis) rather than a discussion technique. Both are useful.

This is a worksheet to help you express your expectations of this training and the areas you need to work on most.

I expect this training to cover ______________________

____

____

____

The areas I need most work in are: ______________________

____

____

____

I'm confident of my ability in the areas of ______________________

____

____

____

I expect to spend ______(hours) in this training.

To make my time worthwhile I've got to have ______________________

____

____

____

____

Whatever techniques you use, the goal of climate setting is to set the stage. Participants need to develop trust in you, themselves, their peers, and the process. Trust is developed only to the extent trainees perceive themselves as members of the group. The expectations you have of them and they have of you must be shared. The best climate is supportive, genuine, informal, and non-threatening.

Things You Can Do To Set A Positive Climate:

- Choose a well-lighted, well ventilated space ... a quiet one. Provide comfortable chairs.
- Arrange furniture so people can see one another.
- Provide coffee service in the room.
- Provide ash trays for smokers.
- Greet people and provide them with some means to display their own name.
- Dress informally.
- Speak informally.
- Start on time. Keep things moving.
- Greet late comers cordially and bring them up to date.
- Provide means for people to warm up to one another personally before attempting work.
- Take time to discuss the warmup exercise. Find out what happened to the participants--how they're coming along. Trainers call this processing. It means looking at an experience and drawing a general learning conclusion from it.
- Help participants articulate their expectations and let them hear yours.
- Relax.

Things You can Do To Bungle and Set A Lousy Climate:

- Ignore the list above.
- Arrive late...after the participants have been waiting half an hour.

Some Behaviors That Will Tell You The Climate You Want Is Being Established:

- Participants appear relaxed and informal.
- High level of social contact among participants and with you.
- Everyone is engaged; no outsiders quietly (and skeptically) looking on.
- No hesitation of participants to approach or direct questions at you.
- Smiles, nods of approval, good eye contact, everyone awake.
- Evident enthusiasm to move on.

Some Behaviors That Will Tell You A Positive Climate Is Not Present:

- Stiff, nervous people; low social contact.
- Handraising and other formal school behaviors.
- No questions and no evident response to comments.
- Nervous laughter and giggles.
- Side conversations.
- People moving chairs outside the group.
- No levity.
- An awareness on your part that you're working like hell.
- Dawdling at breaks; no evident desire to get back to work.

- Challenging, baiting comments.
- Gamesmanship, like the "what if" game: "What if someone in the group were to say he thought training volunteers is a waste of time?" rather than a direct personal statement such as, "I'm wasting my time."

Remedial Action--Climate Setting

If you've botched the initial climate setting phase, a quick remedy isn't usually possible. It's rather like trying to repair a *faux pas* right after making it. Somehow the water seems to get hotter. So, wait. Just let it alone until there is an opportunity to do more climate setting at another time like the beginning of the next session. Or, if you're up to it, just admit the difficulty, and try something else to set climate. Usually people want to see you succeed and will try to help you out of hot water.

Goal Agreement

The only worthwhile agreement about objectives is the one the trainer finally reaches with people he's actually training. It makes no difference what others may desire--supervisors, bosses, parents, deans, captains, politicians, and fairy godmothers--adults will utimately learn only what they personally agree to learn. Even if you build a sophisticated design with a host of objectives (a practice we strongly recommend), the final, workable contract is a design negotiated by the whole group. Otherwise, self-directed learning for adults is an empty, senseless non-term.

At the point of goal agreement, the learner has an opportunity to specify his needs (in comparison with the ones the trainer decided upon during his need assessment) and make a decision as to whether or not his needs can be met in the training. You're not asking participants to start from ground zero and create needs out of thin air. You guide them. You're asking them to check their own needs against those you've assessed. When you first did a needs assessment, you probed for data, formed it, wrote general and definitive learning objectives and thought of ways to accomplish them (techniques). That's what you share during the goal agreement phase, which comes right after climate setting. If you did well in your assessment, very little alteration will be required. Participants will recognize a response to their own needs and be more than pleased to agree on the general learning objectives. They will take the design for themselves and think of it as their own. That is the ideal way to help a group reach an agreement about objectives.

Practically, the process may be more complex than that and not nearly so tidy. More often than not, your original need assessment data will not be supplied by participants. For example, suppose you agree to assist in a neighborhood group to staff a co-op nursery. People in the neighborhood will express a few ways in which volunteers should be prepared; you will have some ideas of your own arising from your experience, and the volunteers themselves may or may not have some ideas as to how they should be prepared. In any event, you probably will have an idea of what you want to do in the way of training before the project gets under way. So, in essence volunteers "come to training" rather than shape it in direct response to their peculiar needs. As a result, when the trainer tries to reach a goal agreement with the volunteers, it may be that there are such wide variations between his own diagnosis and theirs that the original design is useless. Any salvation? Yes.

It is quite appropriate and well within the canons of adult education theory to engage participants in an on-the-spot assessment of their own competencies relative to an established list of competencies generated by you and others knowledgeable in the field. Approached in this manner, the participants are able to express learning needs within the framework of what they must know to complete the task of being volunteers. The procedure is usually efficient and speedy; on one side of the board list the required competencies, on the other side, the competencies people already have. At the conclusion participants don't feel as though they have been pressured to conform or to learn useless information. One assumes, of course, that the design you build will enable participants to acquire the competencies they lack.

There are limits. A trainer cannot create one universal design into which an infinity of content fits. There may be, therefore, participant needs you cannot meet. That's OK. Don't be afraid to say so. If you have seriously misread the needs, convene either a fish-bowl* session right on the spot or suggest that participants choose a committee to meet with you for purposes of design. A clear miss on design is a rare thing unless you've missed the whole scene, essence and all, which is improbable. Nine out of ten times, your design will be close to participant needs; so close, in fact, that participants will wonder why you bothered with goal agreement at all, since there is so little difference between your general learning objectives and theirs.

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*A fish-bowl is a group chosen from participants convened to work on a task on-the-spot while the remainder of the participants watch.

Does the tentative design you bring to the group violate the principle of adult self-direction? Not really. Participants do a lot better diagnosing their own needs and clarifying their objectives if there is a design against which to judge their own responses rather than an infinity of possibilities. You may not choose to reveal your design first; that is, it is legitimate to ask participants to write their objectives and then compare them with yours. This method prevents your natural authority as a trainer from becoming the decisive criterion in selection of goals. Even so, by being clear, you're not being autocratic. There is no requirement that participants accept your design *carte blanche* and no reason why you cannot redesign according to unforeseen problems. If you were going to help someone choose a car, you'd probably not wave vaguely at a bin or two of undifferentiated parts with the question, "What do you want?" Quite the contrary, you'd show a complete model and ask if it fits the needs, and if not, what alterations have to be made to make it do so.

As soon as participants and the trainer have agreed upon the goals, the whole group mutually owns them. It's no longer the trainer's responsibility to drag everyone else around to his goals. The group has goals for which the group itself is responsible. The trainer is a resource, and an important one, but not the only one. At this point, the responsibility for learning is exactly where most adults prefer it, right on their own shoulders.

The trainer's role remains a significant one. There is still a great deal of work for him to do: facilitating, summarizing, managing, and processing. The goals, however, belong to the participants, and the trainer is only responsible for providing ways and means. If some don't choose to learn, nothing the trainer can say or do will change things. That's what we mean when we say, don't take responsibility that rightfully belongs to learners.

Every once in a while, you'll see remarks to the effect that trainers (or teachers, or someone) ought to motivate people. Ignore them. You cannot motivate people. Whenever we hear those remarks we imagine winding up a toy car to a screaming pitch and watching it carom off a wall. People aren't wound up or motivated in the abstract by you or anyone else. We all get interested in specific things for specific reasons. There are particular segments of programs, events, and professions that are motivators but you can't just up and motivate people.

A typical motivator is money; another is pride in workmanship, another is goal agreement. The two parts of a training design specifically intended to serve as motivators are goal agreement and climate setting. They are meant to help people adjust comfortably to a new environment and get a clear notion of how their own needs can be met through training. Those things should help add a pinch of enthusiasm to their lives--and so much the better. That's about as far as you need to go--or can go--in motivating, other than providing useful, interesting training. Nothing is quite so tiresome as a trainer (or anyone else) bucking up the learners. Of course, if you're bored and could care less about what's going on, you'll send a signal that says the training isn't very interesting, and participants will pick it up.

So here is what you have to do: provide clear goals for participants to respond to and help them come to some agreement about goals. Come to some explicit agreement as to which goals you want to accomplish together (given available resources). That is your learning contract.

Things You Can Do To Reach Goal Agreement

- Provide participants with something to help them make their own goals and objectives specific--a worksheet, for example.
- Provide a list of goals and objectives your needs assessment caused you to include in the design.
- Take time to compare participants' goals with yours, and note both likenesses and differences. Check for clarity.
- List the limitations of your design.
- Provide a mechanism (small groups) whereby participants can discuss all the goals and objectives, plus limitations, and produce a revised set of goals and objectives they can live with.
- List the final goals and state the agreement publicly. Check for concensus.
- Maintain a climate of openness, trust, and responsiveness.

Things You Can Do To Muck Up Goal Agreement

- Infer, state, or in any way communicate the idea that you're going to do your own thing in spite of new data from participants.
- Be vague about your goals and objectives.

- Allow participants to be vague about their goals and objectives.
- Say "yes" to everything just to be nice.
- Keep some of your agendas hidden.
- Ignore the goal agreement phase altogether.
- Rely wholly on off-hand comments of one or two influential people (like sponsors, supervisors, etc.).
- Rely wholly on coffee-break rumors.
- Fail to listen.
- Fail to write down the final goals for the whole group.

Some Behaviors That Tell You Goal Agreement Hasn't Been Reached

- Passive silence.
- Lots of argument over goals; a split house.
- Remarks like "What are we going to do in this training?"
- Inability of the group to get to a task.

Game Learners Play in the Goal Agreement Phase

- Hiding real goals.
- Stating someone else's goal.
- Giving verbal agreement to a goal in a large group and taking the opposite position in a small group of their own choosing.
- Abstaining; making no commitment at all; the missing ante in the poker game.
- Pretending to be dumb.
- Running in outside information; "We were told that . . ."

- Loading the responsibility on you; "You go ahead and tell us what to do. You're the teacher."
- Reserving judgement; "I'll let you know as we go along."
- Adding goal, after goal, after goal as a tactic to block group progress.

Games Trainers Play in the Goal Agreement Phase

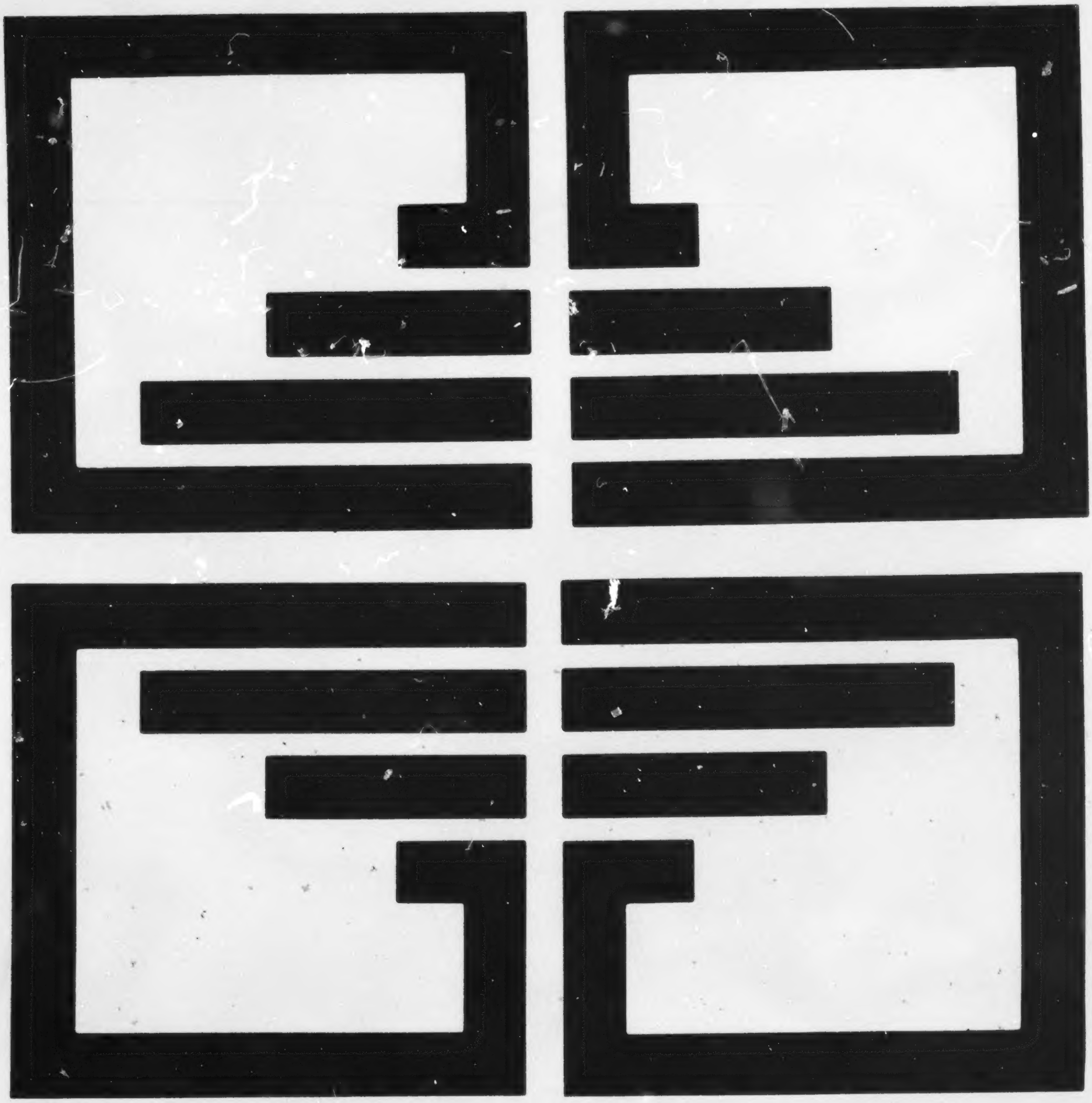
- Saying "yeh, un huh,"" to learners' requests with no intention of changing the design.
- Rewording learners' comments so they fit the preconceived design anyway.
- Martyr: "Well, if you don't want to do what I suggest (sigh), then I suppose..."
- Keeping trainees purposely vague so they can be blamed for failure, if and when it occurs.
- Putting the whole responsibility on trainees: "Well, if you don't know what you want..."
- Contracting for a task group and running a T-Group, or vice versa.
- Using learners' ignorance to mask trainer's ignorance.
- Playing dumb.
- Refusing to say a word or help in any way on grounds that doing so is a violation of the principle of self-direction.
- Hiding real goals.

Remedial Action

Goal agreement is essentially a mechanical act and is not as psychologically sensitive as climate setting. If you don't get agreement, try asking the group to help discover why agreement is hard to reach. Usually people will begin to surface concerns with which you can deal fairly rapidly. The secret is to make it a group concern. It isn't just the trainer's worry. And by all means make it public. Prevent proliferation of hidden agendas.

TRAINING DESIGN

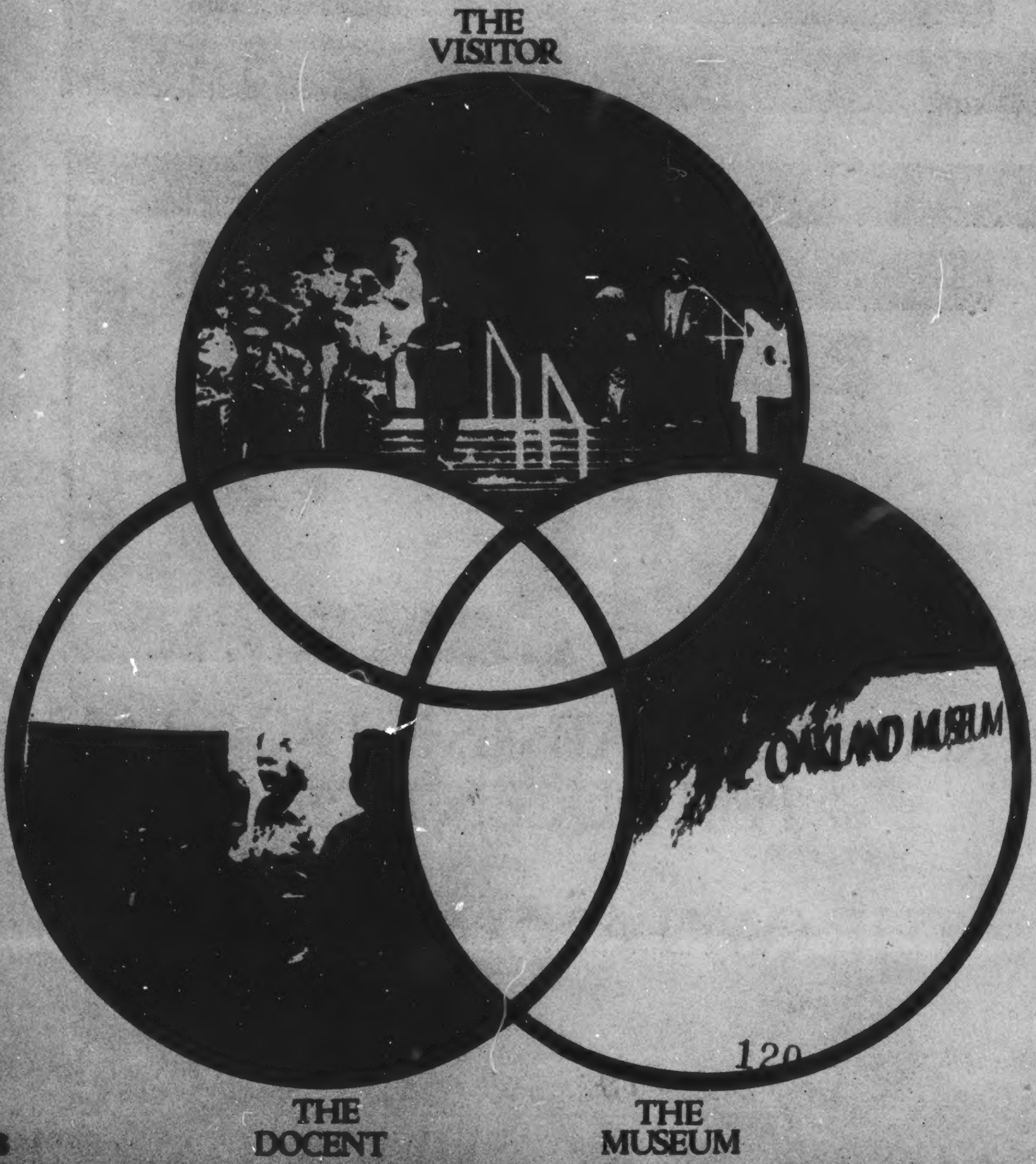
General Learning Objective		
Definitive Learning Objective		
TIME	FUNCTION	HOW
	Establishing Learning Climate	
	Goal Agreement	
	Plan for Achieving the Definitive Objectives	
	Evaluation	



A PERSONAL TRAINING PROGRAM FOR DOCENTS

THE OAKLAND MUSEUM

The Oakland Museum Docent Council's Personal Training Program brings much recent work in the social sciences to bear on volunteer training. We have selected some representative aspects of the program that you may wish to incorporate into your own training process; if you would like to explore the Oakland program fully, the manual is available from the Oakland Museum Association for $2.00.


THE VISITOR
OAKLAND MUSEUM
THE DOCENT
THE MUSEUM

A PERSONAL TRAINING PROGRAM FOR DOCENTS

Developed by

Professor Lawrence F. Lowery Professor of Education

This book has been developed through the cooperative efforts of The Oakland Museum, The Oakland Museum Association Docent Council, and the School of Education, University of California, Berkeley. Its purposes are to enable docents to (1) become aware of certain skills that help museum visitors understand and interpret for themselves the contents of the various galleries; (2) plan and conduct tours that include the use of these skills; and (3) assess the tours to determine their greatest effectiveness in terms of helping visitors derive meaning from the museum.

The information contained in this book is derived from research compiled through a cooperative teacher preparation project at the University.

Fall, 1976

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A GUIDING FRAMEWORK

Frameworks are organizations of basic elements that might lead to a better understanding or general improvement of what one does. In practice, a framework can aid a program by identifying important aspects or problems, by keeping a program in some perspective to other programs, and by suggesting important areas that can be studied and/or improved.

This booklet contains one possible descriptive framework for docent-guided programs. The framework is composed of three related factors and can be schematically represented by three interwoven circles:

1) The Museum - involving the organized knowledge and ways others have derived that knowledge within the areas available to the public.

2) The Visitor - including the many aspects related to background experiences, perspectives, interests, and learning abilities.

3) The Docent - encompassing, in the broadest sense, anything that enables the visitor to better understand that which is experienced through a docent-guided program.

Although each component of the framework can and should be examined as a discrete entity which contains its own elements, organizations, and regularities, the intersections of the components, if carefully explored, examined, and properly understood, can help serve in improving interpretive programs.

Explore the components, examine them, understand them.

WORKSHOP A: The Museum

Every section of the museum illustrates certain concepts that docents hope visitors will come to understand and remember. The visitor's understanding of such concepts or ideas is considered to be a major goal of a program or presentation. Usually these concepts are the "big" ideas rather than the specific pieces of information such as dates or the names of certain plants, animals, or materials.

Think about a section of the museum in which you work. The section might be the collection of Mathews' masterpieces, or the exhibit of California coastal redwoods, or the Hesi-Kuksu Ceremonial Dance Group in the Hall of California history. What are some of the "big" ideas you hope to get across to visitors? In the space below, list some of the goals related to the section of your choice.

After you have listed your goals, discuss them with other docents who are familiar with the same section of the museum. Ask them to share their thoughts about the "big" ideas.

When other pressures are not upon you, reflect upon your goals in terms of the following questions:

How are my goals useful to the visitor?

How do my goals help the visitor derive an understanding of the materials presented in this section of the museum?

WORKSHOP B: The Visitor

Each visitor comes to a museum filled with certain preconceptions. Some preconceptions are accurate; some are inaccurate. Many visitors come motivated to better understand something. A few are just passing through. The visitor is a complex creature, and when visitors gather as a group, the combinations within the group are even more complex.

Certainly each visitor leaves a museum knowing something not known before or feeling something not sensed before. A change in cognition or attitude is clearly an indication that the visitor has learned something. If one considers the visitor as a potential learner, then much can be done to understand and cope with the complexity of visitors in any situation.

For example, there are some things known about how visitors derive meaning or learn from situations:

a. Visitors learn best from firsthand experiences. If a docent demonstrates, talks about, or points to objects, the experience for the visitor is indirect; however, if the visitor is allowed to touch, handle, or smell an object, the experience becomes personal and firsthand - thus has a powerful effect upon the visitor's deriving meaning from the experience. Many docents provide samples of materials for visitors to examine during parts of a tour. This not only enhances learning but has a tendency to satisfy a very natural human tendency to touch objects that are interesting, thus reducing the potential damage to valuable artifacts.

b. Visitors learn best when an experience is close to them in time and space. It is difficult for a visitor to comprehend such ideas as: *"The fossil in this sedimentary rock is four million years old and was set down beneath the waters of a great sea that covered one-fourth of the United States."* What people remember from experiences like this is the vague notion that there was a sea shell in some dirt, and the shell was very old. Meaning comes about by helping visitors realize how one determines (today) that a great sea covered such a vast area. A docent might allow visitors to interpret the above information for themselves by asking, *"If a geologist studying this layer of sediment followed the layer as far as possible, like following a line, and found the same layer in New Mexico, Texas, Louisiana, and several other states, what might that observation suggest to him?"* Such a question, building upon observed data and comparisons of data, can bring a large or remote idea closer to the visitor's personal place in time and space. As a result, the concept will be remembered (and appreciated) for a long time.

There are several other bits of information known about visitors. Select one or more of the following, and try to incorporate it into one of your tours.

a. Advanced organizers improve understanding. An advanced organizer is an early indication given by a docent of the experiences that will take place or the sequence of the key points to be experienced. Advanced organizers, such as the thematic or chronological orders by which art is displayed in the Gallery of California Art, provide visitors with mental structures that help them interrelate ideas. The mental structures also improve memory of the experience.

b. Increasing the number of ways by which a visitor can look at something rather than looking at many things in just one way, helps a visitor derive more meaning from the museum setting. If visitors to the Natural Sciences Gallery look at the leaves of plants only in terms of color and shape, then those individuals are limited in what they can perceive in any environment. However, if visitors are directed to and allowed to investigate other characteristics of leaves such as venation, serration, tip variation, base variation, odor, and texture, they will perceive many more possibilities in other situations.

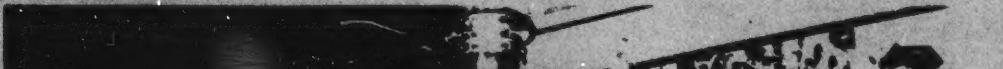
c. Recalling after learning reduces the amount of information a visitor forgets. At the end of a tour of looking at tools, craftwork, homes, and lifestyles in the Cowell Hall of California History, a review of the structure or key points by the visitor (not the docent) facilitates learning and remembering.

One last thought upon which to reflect: *"When you are in the role of a visitor in an unfamiliar part of the museum, how do you derive meaning?"*

WORKSHOP C: The Docent

Interpretive programs take on many forms from brochures and self-guided tours to lecture presentations and docent-guided tours. The form discussed here and throughout the remainder of this booklet involves the docent as an interpretive guide who is in direct contact with visitors.

Creating a situation for visitor interpretation is closer to being an art than it is a science. In attempting to determine the important elements that comprise interpretive skills, one is continually confronted with the problem of identifying, describing, and organizing good interpretive techniques in a way that allows the docent to use them on a consistent basis. A few elements for good interpretation have been clearly identified. They involve using different types of: structuring strategies (verbal and logistical structures can efficiantly guide learning and improve remembering); questioning strategies (direct information, focusing, and open-ended questions can enable visitors to actively think about their experience in various ways); responding strategies (clarifying and accepting responses provide important behavioral models and often facilitate ideas on the part of visitors).



The framework introduced in this module suggests that the value of an effective interpretive program is directly related to the inclusion and quality of the areas represented in the schematic drawing of three interwoven circles. To omit one or more of the circles significantly reduces the value of the program.

For example, if a person (The Visitor) came to one of the galleries (The Museum) and it had no guided interpretive program (The Docent), the amount of understanding of the experience by the person would be minimal. When the third circle of the framework is included, there is an increase in the meaning derived by the individual.

Similarly, if only the guide (The Docent) and a person (The Visitor) come in contact independent of the environment (The Museum), the benefit to the person is diminished. (Lectures and slide presentations are examples of such a two-circle program) Even a guide (The Docent) and her/his topic (The Museum) are of little value if the visitor is not considered in the program. (Many self-guided tours are such two-circle programs because they are designed without giving much thought as to how visitors derive meaning from the environment).

Perhaps an important goal for docents is not to interpret a situation for others but to enable others to interpret the situation for themselves.

PUTTING IT ALL TOGETHER

Three main purposes for this training program were identified at the beginning of this book. The purposes were to enable you, the docent, to (1) become aware of certain skills that help the museum visitor interpret and understand the museum for himself/herself;(2) plan and conduct docent tours that include the use of these skills and behaviors; and (3) evaluate yourself and your activities to determine their greatest effectiveness in terms of helping the visitor derive meaning from the museum.

Throughout the program there has been an attempt to help you learn, analyze, and utilize those behaviors that seem to enhance the visitor's acquisition of meaning from the contents of the museum. Enhancement was built upon the assumption that there are three components involved: THE MUSEUM and the meanings that are there; THE VISITOR for whom all efforts are directed; and THE DOCENT who is the vital link between the museum and the visitor. The focus has been on the docent and the docent's performance of the act of guiding and interpreting.

Your effectiveness as a docent can only be determined by you. You are the one who can best observe the visitor's behavior. You are the only one who can evaluate yourself. You are the only one who can improve yourself.

This program has attempted to provide some behavioral tools with which to work. STRUCTURING: to organize the visitor's attention and interaction; QUESTIONING: to involve the visitor intellectually and emotionally; ACCEPTING: to allow visitors to test ideas freely; USING SILENCE: to encourage reflection on thoughts and feelings; FACILITATING DATA: to provide a responsive environment to visitors' inquiry.

The ideas and tools are here. Listen to yourself. Make maximum use of the tape recorder. Carry it around in the "on" position when you lead a tour. Then, in your own privacy, listen to yourself. Also, talk with your colleagues and share ideas.

But listening to yourself is not the sum-total of self-evaluation. There are some steps that can make the evaluation process more effective. It is hoped that you will be able to perform them with increasing ease as you practice the behaviors described in this book.

For self-evaluation, here are some tasks to consider.

Before Your Tour

1. List the main goals or purposes for your tour.
2. Describe the behaviors you might see visitors perform if they are attaining these goals. Be as specific as possible.
3. Identify those initiating and responding techniques you will use to cause the visitor to perform the desired behaviors.

During Your Tour

1. Use the behaviors you planned for yourself.
2. Observe visitor reaction.
3. Record yourself.

After Your Tour

1. Compare what visitors actually did with what you hoped they would do.
2. Compare what you actually did with what you planned to do.
3. Analyze why you think visitors did or did not do what you hoped.
4. Prescribe what improvement, changes, or alternatives you'll try next time to better achieve your goals.

Just as learning the play the piano well requires practice, so do all skills require practice. This book invites you to try some new skills, see what happens, practice those that suit you and your style - and above all, have fun.

. . . and a brief postscript:

At least two museums report a practice of going to the source for part of their volunteer training. The Schenectady Museum, Schenectady, New York, and the Greenville County Museum, Greenville, South Carolina, use artists, craftsmen and exhibitors as speakers for training sessions. In Schenectady, where exhibitions include art, natural and applied sciences, history and decorative arts, the artist, geologist or research technician who created or consulted on an exhibition is often recruited to explain the exhibition to the volunteers. In the Greenville County Museum, volunteer training includes visits to the artists' studios and on-going workshops in various art media. The committment for the Greenville program, called "Arts InterAction" is one morning a week for a full year (in addition to regular volunteer duties) and payment of a fee.

ON THE JOB

Once they are recruited and trained, what do volunteers DO in museums around the country, and how does the staff guide them in doing it well? This section contains pointers and tips on the ongoing work of museum instruction. We have not included a treatise on methodologies; teaching and interpretation are, as we noted earlier, topics for a sourcebook in themselves.

In this section you will find:

--"How to Plan and Conduct a Docent Tour," from the University of Texas Art Museum Handbook;

--"Observations on Being A Good Guide," from the Old Economy Village Handbook by Daniel Reibel;

--"Teaching or Touring" by Patterson Williams, printed in Roundtable Reports, Summer 1976, and the rebuttals that appeared in the Fall 1976 issue.

"How to Plan and Conduct a Docent Tour" is another selection from the manual produced by the Art Museum of the University of Texas, Austin. Although the subject of the tours in this case will be art, the strategies, the encouraging tone, and the cautionary notes have universal application.

III. HOW TO PLAN AND CONDUCT A DOCENT TOUR

Docenting is an art, and like all the arts -- dance, drama, music, painting, sculpture -- at its very best, it looks easy. The ease is only accomplished, however, when a thorough understanding of techniques is achieved, when a special, innate talent is developed, and when experience gives confidence necessary for a polished performance.

This chapter deals with techniques and should, therefore, be referred to again and again when planning tours. Talent, though not always obvious at first, can be developed to a great extent by careful and honest self-evaluation. It will take some people longer than others, but a latent talent can be carefully nurtured, while an obvious talent, undeveloped, can wither. No amount of writing in a manual or self-evaluation, however, can give a person experience. After all, the *art* of docenting will only become apparent in the *act* of docenting.

APPROACH

> *Teaching is more than the presentation of ideas -- an important ingredient is a sense of excitement about discovery. (Jerome Bruner in Process of Education)*

Do your own thing! This refers to making the most of your own interests, talents, background, and education. Do not try to bend yourself to someone else's tour plan. Give what *you* have to give.

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Be yourself! The easiest, and at the same time, the most difficult thing in the world is to be yourself. It includes being honest, sincere, unaffected, natural, and spontaneous. Docenting, like teaching, is not entirely a rational and logical process, though. It employs perception and intuition, as well as intellect -- the *all* of you.

Get excited! If *you* are not excited about the exhibition, it will be difficult to get anyone else excited. You must get involved with your audience. A docent is in part an actor. Gestures, facial expressions, the stage setting (exhibition), and the dialogue with your audience are all part of the "production." While the idea of docenting as acting is a useful one, however, there is a danger of relying too heavily on it. You must be honest, or your audience will see you as being "on stage," and will think that the tour is a "put-on." Then they'll turn you off!

Be flexible! Your ability to make instant adjustments to varying situations may be the single most important trait you will have to develop as a docent. This refers not only to your plan of the tour, but to your relationship with your group. In docenting, there are so many variables at work, you cannot afford to be "thrown" by the unexpected.

Question all your assumptions! Beware of formulae! Docenting is a creative endeavor, and as such, must be constantly open to self-scrutiny. What are you really trying to do in your docent tour? What are trying to get across -- yourself? the exhibition? "ART"? Can you learn by your successes as well as by your failures?

Care about people, about yourself, about the exhibition and the way you present it. Respect your own uniqueness, and the uniqueness of others, as well as the special thing that the museum has to offer. It is this "specialness" that can make docenting and visits to the University Art Museum an exciting experience for you and your audience.

PREPARATION

> *Prepare yourself in the subject so well that it shall always be on tap; then in the classroom,*

> *trust your spontaneity and fling away all further care." (William James)*

First look and enjoy the exhibition. This is not always possible to do at the museum, since the studying often begins well before the exhibition can be seen. Before you can begin to share your knowledge of the exhibition with others, however, you will have to take time out to look at the objects themselves -- critically, intellectually, and purposefully. Only then can you make statements about them.

Gather your information. Read the docent training materials, take notes at lectures and training tours. Use the bibliographies and the art libraries to read as much as possible about your subject. Take notes of what you read, and make sure that you cite the sources in your notes so you can refer back to them when necessary. Ask the librarian to help you find information if you are unfamiliar with research procedures. Pool your information and resources, and share your discoveries with the other docents on your assignment. Like the proverbial "iceberg," you will need much, much more information about the exhibition than you will probably ever be called upon to supply. But the unseen portion of your "knowledge-iceberg" will be the foundation upon which you will build the seemingly "easy," flexible, exciting tour.

What is the information you're looking for?

General Characteristics:

1. What are all the possibilities of approach?
2. What are the main styles or sub-divisions of style? (Pop, Op, Art Nouveau, Expressionism, Baroque, Mannerism, etc.) Find out all you can about these styles and about other artists who worked in them. Look into other styles which influenced these and which were outgrowths of them.
3. Dates and places - when and where were the objects made, under what conditions, under whose influence?
4. Study relationships - to geography, history, social conditions, mythological implications, etc.
5. Is the exhibition large, small, complete, definitive, a sampling? If the exhibition is not a complete statement of the artist, the style, the country, etc., try to complete it in your studies.

Specific aspects:

1. Personalities -- the artist, patrons, political

or social figures. What are their backgrounds, ages, training, styles, media, etc.? How do they fit into the exhibition?

2. Techniques -- find out how things are done, how they are made. Compare techniques, styles.

3. Functions -- made for what purpose? out of what context? Are they suited to their purpose? Is the design unique?
4. Stories -- about the objects, subjects, artist, function, etc.

Assessment of the exhibition: Is it effective? Why? Does it represent the character of the artist, the style, the era, the exhibit? How is it hung? Chronologically? by subject? by artist? by style?

ANY OTHER INFORMATION PERTINENT TO THE EXHIBITION

THE PLAN OR OUTLINE

> *The discipline of stating your ways and means on paper forces you to really teach. And if you've written it all out, you can step back and look at it before show time, to see exactly what's going on." (Sunny Decker in An Empty Spoon)*

Two copies of a written plan of your tour should be submitted to the Educational Curator before you conduct your first tour. The plan may be in outline form; the only stipulation for the physical form of the plan is that it be readable.

After the Educational Curator has reviewed the plan, one copy will remain in the museum docent files, and the other will be returned to you with comments.

The plan should include a brief opening statement in summary, including the "theme" idea of your tour, and the facts you intend to provide when the tour begins; a list of the objects in the exhibition you intend to talk about; a brief summary of the information to be brought out with each object; where applicable, an outline of how the individual objects tie into the thematic plan of the tour; a closing statement in summary form.

You may also include in your plan suggestions or comments, questions or requests for clarification from the Educational Curator.

If you intend to bring any objects (books, pictures, printed articles, etc.) to the tour, write a statement at the appropriate place in the plan of your reasons for bringing them, and how and when you plan to use them.

The tour plan should not be used as a "canned speech." It should not be memorized or read on the tour. It should not even be carried on the tour. However, as Sunny Decker says, by all means glance through it before you begin the tour -- it might give you confidence in your refreshed memory bank.

All tour plans should be filed with your other docent materials for future reference. They are as important as your other notes and materials on the subject.

THIS IS MOST IMPORTANT -- remember that one of the key words in docenting is *flexibility!* This plan of your tour should not be your last word on the subject. It is a plan -- just one of many that are possible. It gives you a "security blanket" for your first tour, the confidence you need to get started. It is hoped, however, that your tour will grow and change as you get more comfortable with the exhibition, and as your continued studying, and knowledge of the needs of the tour groups will indicate.

PRESENTATION

> *Education in a new and greatly broadened sense can become a lifelong pursuit for everyone. To go on learning, to go on sharing that learning with others may well be considered a purpose worthy of mankind's ever-expanding capacities. Education, at best, is ecstatic. (George B. Leonard in Education and Ecstasy)*

Greeting your group: Get acquainted with your group; find out about them -- their special interests, special needs, what school they are from, what grade or type of class they are in (art, geography, history, English, etc.). Find out if they have had prior preparation; ask questions which will give you some idea of the extent of their preparation. Ask the teacher how much time you have for the tour and adjust your tour to include the objects which will meet the special interests of the group in the time allotted for the tour.

If you have an adult group with differing interests, backgrounds, or knowledge of art, try to find out about their common interests and adjust your tour to them.

Set the mood for the tour by giving some introductory remarks about the way the exhibition is set up and how you will cover the objects on your tour. With youngsters make a few brief remarks about museum manners and the need to keep together. Enlist the assistance of the teacher or adult in the group to bring up the rear, keep the group together, etc. This will leave your time free to concentrate on the tour itself.

Museum manners: The key idea here is "consideration for others." The considerations include not talking too loud so that other tours groups or individuals will not be disturbed; not sliding or running so that people and art objects will be bumped; stay with your own group; do not touch the objects as they do not belong to us and we must take care of them so we can return them in the same condition as they were given to us -- you might suggest an enjoyable concept that they try to "touch with their eyes."

Docent techniques:

1. Moving your group. Always be at the head of your group. Before moving from one area to another, inform the group about where you are going, tell them how to get there, and then walk at the head of your group to the new area. Wait for everyone to arrive before you begin to talk again. Make sure that the teacher or adult in your group brings up the rear with the stragglers.

2. Face your audience. Stand to one side of the object you are discussing. If you know the object well, you will not have to look at it yourself while talking about it. By facing your group at all times, you can direct their attention to the important details. At times it may be more convenient to stand to the rear of your group so that more people can see. Be sure that everyone *can* see. Take the time to give everyone a turn to see if necessary.

3. Do not touch the objects. As we have asked others not to touch the objects in the gallery, we must observe this restriction ourselves. It is important to remember this, as it is very easy to forget when we become familiar with the objects and they are like "old friends."

   When we have been told that there are objects we can let the visitors touch, we must keep control of the situation and let just one or two persons touch at a time.

4. Include the "restless fringe." In each tour there are usually some individuals who stay at the edge of the group and lose interest very quickly. Try to include them as often as you can in the discussion -- ask questions, invite their comments. If you notice quite a few in the group trying to find places to sit, this might be your clue to invite the entire group to sit on the floor. Find a convenient area where there are several objects you can talk about without having to move. If this is not possible, you might start a discussion about what they have seen, and try to draw out the students about the significance of the exhibition, etc.

5. Shifting gears. Flexibility is the word again! If your group seems to be losing interest, it is time to hastily think about your approach. Try to find a common interest again. This might be the best time to ask questions about what they enjoy, what interested them, about whether or not they understood what you are saying. It also might be the opportune time for a story, or if you have been "lecturing" too much, for a dialogue.

6. Unusually large or restless groups. Here, the technique of docenting must be adjusted to the needs of the group. With unusually large groups, the tour takes on more of the character of a lecture, with fewer stops along the route. You will have to choose just a few objects or areas to talk about; the less movement the better. Smaller groups make dialogue more feasible. With a very restless group, the best approach is to have them sit on the floor where movement is kept at a minimum. Again, you will move only a few times to different areas or objects. You might try to find out the cause of their restlessness, and attempt to counteract it.

7. Questions and answers. Encourage questions and comments. These are clues to you about how well your group understands what you are saying, and about how well they are involved with the objects and the theme of your tour. Of course, always be as polite and helpful as possible. Be willing to state the limitations of your knowledge. You should not be considered an expert in the field. You are *sharing* your knowledge with the group, not expounding. You can, however, suggest sources where answers to their questions might be found.

Information to include in your tour:

Remember to introduce yourself at the beginning.

All the information about the exhibition does not have to be stated at the very beginning. It is boring for your audience to stand through a ten-minute introduction without seeing the objects. Plan your tour so that the information can be dispensed throughout the tour. This might include the name of the exhibition, the artist; who assembled it and why; the idea behind it; how the exhibition is arranged and installed and why; what it includes and what it does not include; the general setting and background; history and over-all characteristics; indicate how to look at the objects (from a distance, close up, walk around, etc.); indicate how much time is available for the tour and how much time is needed to absorb and enjoy the exhibit.

Your tour may comprise a selection of the most important and representative objects in the exhibition, all objects, or a combination with key examples stressed and all objects discussed briefly. This will depend, of course, on the time available for the tour, as well as on the size of the exhibition.

Encourage visitors to come back again. Tell them about future exhibitions, if you know them. Tell them how long the exhibition will be on view so they can tell their friends and parents about it.

Stay with your group until they are out of the building. "See them to the door"; make the teacher aware of the fact that the building is used as a school and it is disturbing to the classes to have groups roaming through the halls unescorted.

Suggestions for working with children:

1. Try to relate the objects and exhibition with the students' own experiences.
2. Be careful of your vocabulary -- do not use difficult or "arty" words, but do feel that you can introduce one or more new words. Give clear definitions. This will be in the nature of "giving them something to take back to class." Especially with high school students, however, be careful not to talk down to the students.
3. Reinforce new ideas and words by repetition at appropriate times. Recognition of newly learned concepts or words will make the tour more exciting.
4. Be considerate of the individual students in relation to the group. Do not be demanding with students who seem shy or embarrassed. Do not make any student seem different (better or worse) than the group. Status with *peers* is more important than adult approval.
5. The younger the students, the more stress can be placed on narrative, story, adventure and people. Older students will enjoy more abstract ideas of aesthetics, politics, history, sociology, etc.
6. Observe, listen, be helpful, and above all, enjoy what you are doing and try to help the students enjoy it too.

The "Human Condition"

Remember the first moment, the first time you saw the exhibition, and try to keep it fresh in your mind, even after many tours. Then empathize with your group and try to feel the way they must feel on first entering the museum. Be aware of the strangeness of the setting, especially if your group has never been to the museum before.

When a class comes from a school, the relationship between the teacher and his or her students is very important to the tour. If it is an obviously pleasant relationship, capitalize upon it and include the teacher often in your discussions. If the relationship is strained, be as diplomatic as possible, and try to set everyone at ease.

Some of the students come from schools and areas where they are unfamiliar with stairs. The circular staircases in the museum are new, exciting, but often frightening for some. Give them a chance to adjust to it. Explain that they must go slowly and hold on to the handrail. Tell them that you will wait for them to go up or down, so they will not feel they have to rush.

There are variables in docenting which are beyond our control. Most of these can be listed under the heading of "poor" planning on the part of schools and teachers." This includes groups that come to the museum at about 12:30 or 1 o'clock without having had lunch (some of the poorer children often come to school without having had breakfast), and some classes whose scheduled museum tour conflicts with school activities the students do not want to miss. There is not much that you as a docent can do under the circumstances, except to prepare for the unexpected.

There are times when, due to human error, bus breakdowns or mixed-up scheduling, docents will come to the museum to conduct a tour and find that they have come in vain. This, fortunately, does not occur often, and we hope that we can depend upon your understanding and cooperation.

SELF-EVALUATION

It is the successful experiment which is decisive and not the thousand-and-one failures which preceded it. More is learned from the single success than from the multiple failures. A single success proves it can be done. There after, it is necessary only to learn what made it work. [Robert Merton in his essay, "The Self-Fulfilling Prophecy"]

Examine your own successes: Try to think about the things on your tours that really worked, that made you *feel good*, that excited and involved your audience. Then, see if you can repeat these things with your next group. If you can, you know you're *on* to something.

Examine the successes of others: Follow other docents on their tours, especially the ones who seem to enjoy their tours. Try to pinpoint the successful techniques used. You might use the Guide for the Evaluation of a Docent Tour to help you find the elusive *something* that spells success. Then try to adapt it to your *own* style, your *own* technique.

Don't be afraid of making mistakes: You can learn from your failures too. *He who never dares, never fails, but he also never succeeds.*

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"Observations on Being a Good Guide" is the second contribution taken from the manual of Old Economy Village for inclusion in this sourcebook. Only a few words need to be changed to make this document applicable to other settings; the thoughtfulness will continue to shine through.

OBSERVATIONS ON BEING A GOOD GUIDE

The guide is the visitor's contact with the Harmony Society and Old Economy. A good guide can give the visitor an experience he will never forget. A poor guide might do the same thing but in an undesirable fashion.

A good guide has rapport with his/her visitors. A smile, a kind look, a question about the trip here, interest in the visitor, all help.

A good guide gives the tour with good humor, no matter how difficult this may be. However, a good guide never makes fun of the past. The past cannot interpret itself; this is the function of the guide.

A good guide is informed. If you are asked a question to which you do not know the answer, you should tell the visitor that you will "find out." Try to get the information and inform the visitor even if it requires a letter. A good guide keeps constantly learning about the people of the Society and their times.

A good guide tailors the tour to the group, the time of day, the weather, etc. He/she avoids giving the same dialogue in the same tone of voice to every tour. He/she tries to learn if the visitors have a special interest and emphasizes that.

A good guide is flexible. He/she suits the physical handling of the tour to the circumstances and is prepared to change route as conditions change on the tour.

A good guide does not bring his/her personal life into the tour; visitors come to see the museum, not the guide.

A good guide is alert to visitors who will help the museum. He/she should be on the lookout for all offers of aid or interest and try to channel it toward the museum. Recruitment of other volunteers, offers of Harmonist-related artifacts, a visitor with a skill or craft, money and other aid, are all things for which the guide should look.

A good guide is also an usher and will be aware of the physical problems of handling each tour to make sure it flows smoothly. No two tours are alike.

A good guide avoids discussing the value of museum objects, especially in terms of money value and age, and tries to fit the whole collection into the visitor's consciousness. Never give a "catalog tour" of the collection. The information on particular items is to be used in response to questions from visitors.

There is a staff of seventeen at the museum, plus about 250 volunteers. The only one the visitor will see will be the guide; he or she does not care if you are a volunteer. The reputation of the whole museum is in your hands.

The issues raised by Patterson Williams in "Teaching or Touring," and responded to by other museum educators in successive numbers of Roundtable Reports, have been used as in-service training exercises for volunteer docents. The article and the replies can be helpful in clarifying the goals and practices of docentry.

ROUNDTABLE REPORTS

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TEACHING OR TOURING?

(Editor's Note: This article has been condensed to adapt it to RR's format. We hope, in publishing it, to provoke readership response so that in the future RR will serve as a forum for articles and letters contributed by our subscribers.)

The museum public and even museum officials are often confused about the difference between gallery teaching and gallery touring. Museum teachers are often mistaken for tour guides and vice versa. "Touring" is usually the word used to cover *all* educational activities in museum galleries including the more intensive teaching activities. Careful reading of the dictionary or comparison of real life museum lessons (teaching) and museum tours reveals the substantial differences between these two public services. Why, then, is there so much confusion?

For one thing, terms like museum visit, lesson, gallery talk, tour, and lecture have different meanings at different institutions. What is listed at the Philadelphia Museum of Art as a "Gallery Talk" is called a "Seminar with the Original" at the Metropolitan Museum and a "Public Lecture" at the Art Institute of Chicago. In Philadelphia a teaching experience designed for school children is called a "Museum Lesson;" at Sturbridge Village, it is a "Group Visit," and at Colonial Williamsburg, an "In-Depth Study Program." What is the difference between a docent, a volunteer guide, staff lecturer, museum teacher, group leader, group assistant, gallery interpreter, and an escort? If the function of a title is to inform the public about the skills and scope of services available from the title holder, the proliferation of titles is self-defeating. The public can have some assurance that curators are curators and conservators are conservators almost everywhere, but there is no such consistency for museum teachers and tour guides.

There are other reasons for the confusion. Both teaching and touring are transitory events that are difficult to study or document. Both occur in the same spaces, museum galleries; and both frequently involve one museum person (tour guide or teacher, both usually female) and a group of visitors. As it were, "They all look alike." But the most distressing possible explanation for the confusion is that most of what can be seen in museums is a variety of touring, and that there is very little real teaching to be observed.

Teaching and touring are the two opposite poles of a continuum of direct services to museum visitors, and only by offering both kinds of experience can museums begin to provide a full spectrum of services to their publics. In the case of any given audience the best sort of experience could be anywhere along the continuum. For a group of sightseers an experience far to the touring end of the scale would most nearly satisfy the group's needs and desires. For a class finishing a unit on the Middle Ages a teaching experience with Medieval Art would be most appropriate.

This concept is predicated on three major assumptions. First museums have separate and distinct audiences, plural. Each audience, tour group, class has a different set of needs, background and group dynamics. Second, there is a variety of equally legitimate uses to which these audiences can put their museum visit from novel experience to lifelong scholarship. Third, museums should be capable of providing a *range* of experiences for these audiences. Given sufficient respect for its audiences as well as sufficient technical skill and sophistication, museum staff, educators, and curators should be able to provide a varied schedule of exhibitions (varied not only in content but also in method of presentation) and a varied program of public events, including both teaching and touring experiences.

The practical differences between teaching and touring are apparent from direct observation of successful examples of the real life events. Three major areas of difference

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Information about membership in the Museum Education Roundtable can be found elsewhere in this issue.

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emerge: — pacing, group participation, and leader skills and preparation. The difference in pacing, the actual physical movement of the group, is easily discernible. The touring visitor or group moves steadily by means of a series of brief pauses and covers a relatively large area. The tourist usually stands, causes little disturbance when present, and quickly moves on. In contrast, the teaching-learning group may move rapidly on the way to its destination; however, once there, the group (whether made up of adults or children) may completely occupy the space by sitting down, having a discussion, doing theatre games, drawing, reading labels, or performing a variety of other tasks. Teaching is frequently, though not always, accompanied by its own noise and can seriously disrupt traffic patterns and museum quiet.

The difference in the area of group participation and involvement is partially one of degree; but more important is the difference in the *nature* of the audience's participation. In tours the group members are less intensely involved with museum objects or displays than they would be in teaching-learning situations, characterized by concentrated, relatively long-term examination of single objects. Indeed, such in-depth examination is actually at odds with the intention of a touring group to obtain an overview of a collection and to come away having enjoyed oneself, in a limited amount of time. Tours are designed for the infrequent or out-of-town visitor who wants to see a lot lightly. They are also good experiences for first time visitor who wants an overview as an introduction to further use of the collection on his or her own time or in teaching-learning situations.

Both the tourist and first-time visitor should be allowed the right to be primarily passive participants. Their privacy should not be violated. They are usually a group of relative strangers who come to see the museum and not to get to know each other. Even in cases when the tour group is a family or a group of friends the group members should be only gently prodded into participation by the tour guide. The guide must elicit comments in order sensitively to read the group to gather enough information so that the tour can be tailored to its needs. Tours are meant to be gracious, cool, and pleasant.

Lessons are intense, concentrated, and sometimes even disturbing. They require the viewer to be an active participant — to make judgments, to consider controversy, to wrestle with difficult questions. Sometimes they ask the participants to share their judgments and opinions. In teaching-learning experiences the character of the group participation is more intense. Teaching groups do not have the option of being passive. Active participation in the sequence of activities or discussion topics planned by the teacher is necessary for a successful lesson. Both high-powered lectures (conservative expository teaching) and inquiry method learning activities (progressive, Deweyan teaching) require the intense involvement of the participants. Such involvement usually means more effort on the part of the learner and more planning on the part of the teacher, but the result is a more enduring, more "educational" experience.

Because of this, lessons are best suited for audiences made up of people who already know each other, people who attend the museum regularly, and for groups that choose to use the museum lesson as part of some other course of study. Thus lessons are well designed for most school groups — elementary through college.

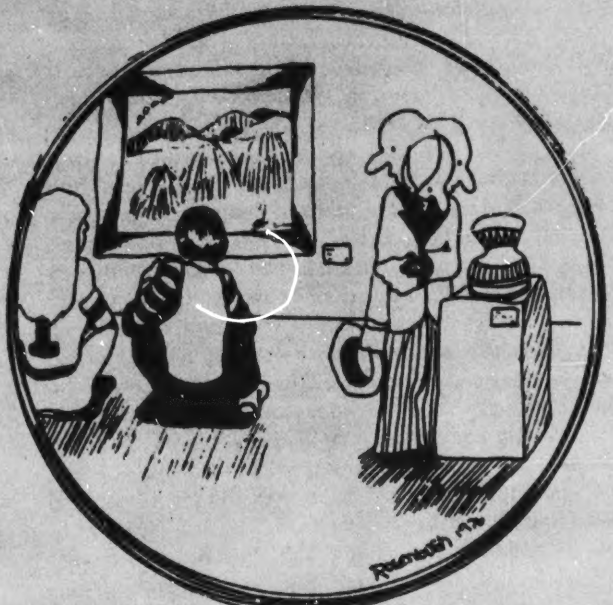
Teaching and touring need not go on in groups or in the company of a human being. In fact, the most, effective teaching or touring tools are often the physical design of an exhibition and its label copy, gallery handouts, video adjuncts, and catalogues. Distinctions between teaching and touring exhibitions are based on the type of audience behavior, the exhibition design, label copy, etc., encourage. One advantage of a teaching exhibition is that it can usually be toured by those who simply choose *not* to make use of the teaching elements by, for example, not sitting down and watching a videotape, or by not reading label copy. A touring exhibit, however, can seldom become a teaching experience unless the audience is fairly sophisticated and familiar with the subject of the exhibition.

PREPARING TEACHERS AND TOUR GUIDES

In the case of both teaching and touring, high quality experiences for the audience are best achieved when the guide or teacher is sensitive to the character and needs of the group and allows the group to make as many decisions as it is willing and competent to make. Making this happen while still accomplishing the overall goal requires considerable skill and discipline on the part of the human guide or teacher. The ultimate solution to providing good experiences, those tailored for the different audiences, depends on the ability of the guide or teacher to assess accurately the needs of the individual group.

Guides can be prepared in a relatively short period of time, providing that they are, as a group, as diverse as the museum's touring audience. If the audience is foreign the guide should speak the foreign language. If the audience is white and upper middle class the guide should be also; however, if the audience is something else, so, too, should the guide be something else. With some exceptions, most people find it easiest to be acutely sensitive to those most like themselves. Often people from one economic level can seriously misread people from another level. Meeting someone extremely remote in age or class can be disconcerting, can get in the way of an easy, smooth, cool tour.

Leader preparation needed to create successful lessons or successful tours (events or exhibitions) is quite dissimilar. A person planning a touring experience should be thoroughly familiar with the course, in most cases the general outlines of the museum's collection. On the other hand planning a teaching experience requires in-depth familiarity with individual objects and a thorough understanding of the developmental stages in the learning process. Being a tour guide requires a great deal of self-control; a calm



friendly manner; familiarity with and sensitivity to the audience.

Museum teachers are longer in the making than tour guides. The museum teacher must be prepared to act as an instigator of profitable activity on the part of the audience. For this the teacher needs to have a thorough familiarity with museum objects usually obtained by having an academic background similar to that of curators or at least by taking advantage of curatorial research on museum objects. In addition the museum teacher must understand the learning process as it is experienced by a variety of audiences. The person who is capable of teaching should be capable of conducting a tour when the situation calls for a tour. Most tour guides, however, are not prepared to teach. Their flexibility is more limited. Museum teachers, by virtue of a double expertise (in museum objects and audiences) should also be flexible enough to communicate with a wide variety of audiences.

Both teaching and touring are in demand, both are useful, both can be done well or done poorly; but they cannot be judged by a common standard. They are different in kind. Far too often one is simply judged to be a poor version of the other. In fact, the tour that gets bogged down in a too intense conversation between the tour guide and one member of the group, or by a too lengthy examination of a single object is a poor tour. A group involved in a museum lesson (teaching) that merely walks through galleries pausing only for brief comments from the teacher is a poor museum lesson.

One reason for the proliferation of titles such as teacher, docent, and staff lecturer, is that professional museum educators are in search of a distinction between their job and that of the volunteer. If volunteers give "gallery tours" the professionals give "gallery talks". If professionals are called "group leaders", volunteers are called "group assistants", in an ever expanding effort, on the part of both professionals and volunteers, to differentiate between their roles.

Even more importantly, professional museum educators are searching for a way of notifying other museum officials, trustees, and staff that what a fulltime, professionally trained, career-oriented museum educator can provide in the way of services for the public is different from what a volunteer can provide. In most museums the professional educator performs those tasks which seem to require the most academic expertise. In some places this means that a single professional trains many volunteers who then do all the work with the public. In other museums with more education staff, professionals work with the adult public and volunteers with children. In still others, professionals may do "heavy", "college level" art history lectures with slides and volunteers may do "lightweight", "elementary" tours of galleries.

None of these distinctions makes much sense. Where the single professional trains the volunteers, the public never gets the benefit of the most expert teacher available, and the expert teacher teaches how to teach without testing any of the methods on the public. In the second case, it is assumed that it is easier to teach children than adults when it is more likely that the opposite is true. In the third case, the related assumption is made: that serious museum education should parrot college art history courses. This attitude ignores the unique opportunity museum educators have of working with *real objects* rather than what is, after all, only a poor substitute, *i.e.*, slides.

But it does seem logical, and even necessary, that in order fully to use the skills of each some distinction between the responsibilities must be made. I suggest the distinction be that professionals teach and volunteers give tours. Both provide needed services, each according to what she can do best. Not all institutions will be able to afford sufficient paid professional staff to put this distinction into practice; but all institutions with an eye to providing full and quality services for the public might plan for and work towards such a goal. Eventually it might be possible to professionalize tour guides also.

Hand in hand with a distinction in job descriptions and work roles, a commonly accepted title is needed. As long as there is such a variety of titles, the titles cannot serve their purpose. "Restorers" have become "conservators" as part of a re-definition of their roles and "curators" are called by no other name; therefore, let there be "museum teachers" and "tour guides".

—Patterson Williams

LETTERS TO THE EDITORS

"TEACHING OR TOURING?" — REBUTTALS

To the Editor:

There is much plain good sense in Patterson Williams' "Teaching or Touring?" Museums do — or can — serve quite diverse audiences. Curators, exhibit designers, and museum educators would do well, as Ms. Williams advises, to learn the different expectations and capabilities of their audiences and do their work with those varying characteristics clearly in mind. These admonitions cannot be taken too seriously by museum persons who desire to make their institutions' collections more accessible and meaningful to the public.

But then, at the end of Ms. Williams' piece, I read a sentence which made me wonder whether I hadn't misunderstood all that I'd read before. What gave me pause was the author's suggestion that the distinction between responsibilities that museum educators should make "be that professionals teach and volunteers give tours." Why can't and why shouldn't paid and volunteer museum educators be trained and ready to give "intense, concentrated, and sometimes even disturbing" lessons as well as "gracious, cool, and pleasant" tours if they are capable and interested in doing so? As far as I can tell, neither nature not nurture has placed immovable barriers to non-paid museum educators "teaching", as Ms. Williams defines that term. Of course, selection, training, and continuous evaluation are needed to prepare anyone to be an effective "museum teacher", but it escapes me what bearing one's employment status need have on a person's fitness for such work.

Then why is this suggested distinction put forward? Ms. Williams does not say in so many words why she thinks volunteers should only be "tour guides" and that only paid staff be "museum teachers", but her underlying reasons stand out clearly enough if one rereads the article with this question in mind. Stated most boldly, Patterson Williams believes that members of the species "museum docent" are unfit by virtue of the shallowness of their academic backgrounds, their relative ignorance of the learning process in the museum's various audiences and inability to be sensitive to people unlike themselves, to be "museum teachers". Docents (and this is whom she refers to when she writes "volunteers"), if adequately trained, can give "tours" but "teaching", alas, is beyond them.

This condescending attitude toward docents may be based on Ms. Williams' own considered judgment of the volunteers she's been acquainted with during her career as a museum educator. Maybe it has other sources, I don't know. What I do know from my own experience is that persons who volunteer their time and talents to museums can or can be trained to "teach" (by Williams' definition) in and out of the museums as well as to be excellent "tour guides". Volunteers will be as good as their training. They reflect the quality of the training provided by the "professional educators". Indeed, it's my opinion that a museum education program that does not allow for museum teaching by volunteers is seriously underutilizing its human resources and is demeaning its staff of docents. Expect little of people (and Williams' can't disguise her higher estimation of "teaching" over "touring") and you'll get little; expect much and it will be given.

The people who create and run museum education programs, indeed, should give much thought as to how best to utilize the various kinds of people on their staffs. But they should be wary lest this thinking be damagingly misguided by their own anxieties over their own professional status. The best way of showing "other museum officials, trustees, and staff" what professional museum educators can do is not to put as much distance as they can as quickly as they can between themselves and their museum's volunteer educators, but to develop and competently administer imaginative programs and materials which allow individuals in the museum's several audiences to better know themselves and the human and natural worlds through *real things*. This task, it seems to me, is rather more important for "fulltime, professionally trained, career-oriented" museum educators to perform than the unproductive, even destructive job of putting people in air-tight compartments and marking them indelibly as "museum teachers" and "tour guides". Compartmentalization has much to do with building bureaucracies, but little to do with educating in a setting, the museum, which virtually requires catholicity and flexibility in experience, learning, and method.

—Dennis O'Toole
Curator of Education
National Portrait Gallery

To the Editor:

After reading "Teaching or Touring?" the only point with which we can agree is that there is a profusion and as a result a confusion of terms used within the field of museum education. However, the article which Ms. Williams has written is itself confused and predicated on false assumptions. Therefore, it does nothing to help clarify the issue which she initially raises.

Ms. Williams' definition of tours vs. lessons is at best one dimensional and at worst destructive. As disturbing as her terminology is, we will not belabor this point since it seems to us that her flawed definitions are based on a fundamental error. This error is that "professionals teach and volunteers give tours". We have worked with volunteers in the field of zoo education for 3½ years and our own experience and conclusions differ so drastically from hers that we are at a loss to explain such divergency.

Ms. Williams' statement that "Eventually it might be possible to professionalize tour guides also" is distressing and offensive. A professional is defined as "a person who does something with great skill". The participants in the volunteer guide program at the National Zoo and in other programs as well, perform their jobs with intelligence, enthusiasm, and reliability. Their knowledge is vast and their learning is self-motivated. They are already professionals. Implicit in Ms. Williams' article is also the assumption that the *paid* staff member who has earned his or her college degree from a duly accredited university is by their very nature superior to the volunteer. Do museums, zoos, and related institutions really have to get caught up in measuring the worth and/or intelligence of its staff by the number of degrees and size of salaries they earn? This reeks of elitism.

Contrary to Ms. Williams' assertion, guides do not have to be black to teach black school children or middle-class to teach middle-class school children. They do need to be knowledgeable, sensitive, and enthusiastic. These qualifications, more than color, class, college education, or salary determine the success or failure of any learning experience.

According to Ms. Williams "most tour guides . . . are not prepared to teach". If tour guides with whom Ms. Williams is familiar cannot teach, we are inclined to believe that it is the program, rather than its participants, that suffers some deficiency. Indeed a program which is designed to do no more than turn out tour guides capable of providing an overview of the collection cannot fault its participants. Rather, the fault, if there is one, lies with the professionals who are ultimately responsible for administering such a program.

On the other hand, a program which recognizes and utilizes the capacities of its volunteer staff can and does have guides who provide a quality educational experience for a diverse audience.

To quote from "Teaching or Touring?": ". . . most of what can be seen in museums is a variety of touring, and that there is very little real teaching to be observed." We invite Ms. Williams to come to the National Zoo and join a tour where she very well may learn a "lesson".

Sincerely,

Susan R. Trencher
Donna M. Schlegel
Margaret F. Morton
DEPARTMENT OF EDUCATION AND
VOLUNTEERS, FRIENDS OF THE
NATIONAL ZOO

"TEACHING OR TOURING?" — A RESPONSE

To the Editor:

In considering a reply to the response to Mr. O'Toole and others to "Teaching and Touring?", I have decided that the sticking point is, in essence, the question of whether museum education departments should be staffed by paid full-time "professionals" or by volunteer part-time "docents". My reply is, therefore, a clarification of some thoughts on that question.

As fund raisers and policy makers, volunteers have been instrumental in starting museum education departments. Such help is still needed and always will be. In the staffing of education departments, however, volunteerism can be destructive.

Today many museum education departments consider themselves "professionalized". That is, paid staff persons do administrative and secretarial work and coordinate division of education activities with that of curitorial, security and other museum staff. However, actual contact with the public — the essence of any educational service is still performed by volunteers or docents.

Thus after over 40 years of existence and despite the widespread "professionalization" of museum education departments, the field of museum education has produced only a handfull of professional museum *teachers*. Furthermore, many administrators of volunteer-staffed programs assert that limited funds make fundamental change impossible, or that there is in fact little difference between what a volunteer docent and a professional museum teacher can do.

Taking the second assertion first, consider the following: A docent conducting one tour a week or 48 weeks a year has 48 experiences per year. A museum teacher teaching 10 classes a week for the same period of time has 480 experiences per year. In terms of working experience, which is usually directly related to professional maturity, a docent of 10 years is comparable to a museum teacher finishing his or her first year of work. Given this kind of accounting there are, among the many museum docents, very few who have had the opportunity to mature in their field. Even after 30 years of service a typical docent has the work experience of a novice museum teacher. Among the few museum teachers that exist today, there is only a handful who have over 10 years experience. In conclusion, there is not, and never has been a mature work force providing direct touring or teaching services to the public in museums. Is it any wonder that museum education has not yet fulfilled its potential?

In the 40 years of their existence, museum education departments have not progressed beyond the elementary stages of program development. Education programs (despite some strong experiments) consist of the same narrow range of tours, treasure hunts and lectures that are listed in museum brochures of the 1930's. While many of the docent conducted programs are well done, they represent only a fragment of the range of programs needed to effectively serve a museum's audiences. This lack of development is probably in part a direct result of having a volunteer and temporary docent work force rather than a full-time, well-paid, and career-oriented museum teaching staff. The opportive words here are "full-time" and "career-oriented". A docent who will work eight hours a day five days a week, 48 weeks a year, and who will commit his or herself to a 30 year career as docent is a docent of professional caliber. We cannot realistically expect that kind of service without paying for it.

In recent years a rhetoric of museum education has grown more complex and sophisticated as a result of having professional museum education administrators. Such rhetoric, however, will not be translated into action until there is a group of pofessional museum teachers. The success of the best planned curriculum is totally depended on the existence of highly competent teacher.

In considering the problem of funding for museum teachers, several solutions are possible. Administrators might devote more substantial portions of their time to teaching. Some secretarial work, acting as receptionists or taking appointments, might be done by volunteers and the money thus saved, spent on museum teachers. But the most likely source of money will probably be directly related to the development of some sophisticated education programs.

At the 1976 AAM Conference several educators, not from museums, expressed considerable doubt as to the seriousness of the educational intentions of museums. Better, more serious, educational programs might open many new avenues of funding from sources normally reserved for accredited educational institutions. Or, museums could seek accredidation for their own educational services. In any case the problem of funding museum teachers is not hopeless.

In conclusion, the museum education profession is at a crucial crossroad. In the next five years most museums will continue to face serious financial problems and we have not yet produced programs of sufficient complexity, variety and seriousness to warrant keeping any professional educators in museums. The reason we may not warrant future funding is that in the past we have not channeled enough funding into the development of a mature workforce of professional museum teachers.

—Patterson B. Williams
Philadelphia Museum of Art

PAPERWORK

Many of the considerations in working with volunteers tha are touched on in the other sections of this sourcebook require the keeping of records, both by museum staffs and by volunteers. The samples in this section range from simple and informal to highly specific requests for information on skills and qualifications. Many museum educators advocate personal interviews to supplement information given on recruitment and application forms.

But, forms are not used solely for application purposes. The excerpt from an article by Pat Hardy, "Experience and and Training Records: Volunteer Recognition that Counts," suggests that record keeping may be important to a volunteer's future work; indeed, some museums have been able to offer volunteers credit through local universities for the experience and training that they have had in the museum--something for which records are a necessary part.

One aspect of a volunteer's life that is seldom represented in the data sheets is the number of other committments she may have. A recent study of museum volunteers in California by Patricia Armstrong Warren reveals that the average volunteer belongs to four to six organizations. Since the museum is thus in the position of competing for the volunteer's time, why not find out who, and how great, is the competition? It has been suggested by reviewers of the materials in this section that questions about marital status and children may be inappropriate to the present status of women. It might be argued that volunteers with young children do have special needs of which the museum educator might wish to be aware, but perhaps there are other kinds of special responsibilities that volunteers may have, and wish to make known to the scheduler and this might be handled by asking a more general kind of question.

In this section you will find:

--an application for the docent program at the Arizona-Sonora Desert Museum;

--an application, time-preference sheet, monthly schedule and leave of absence request from the Corcoran Gallery of Art;

--a docent information sheet from the National Portrait Gallery;

--volunteer personnel records from the High Museum of Art;

--Oakland Museum Docent Council Gallery Information Form; and

--"Experience and Training Records: Volunteer Recognition that Counts," Pat Hardy, Volunteer Administration, Spring, 1978.

[illegible]IZONA-SONORA DESERT MUSEUM
[illegible]O.Box 5607, Tucson, Arizona 85703
Telephone 883-1380

Prefer (Morning class ______
(Evening class ______

APPLICATION FOR DOCENT PROGRAM

Name ______________________ Spouse's Name ______________

Address ______________________ Marital Status ______________

City ______________ Zip ______ Telephone ______________

Birthdate ______________ Number of Children ______ Their ages ______________
Month Day Year

Number of years you have lived in Tucson ______________

Educational background ______________

Professional background ______________

Previous volunteer work ______________

Present volunteer work ______________

Experience working with children ______________

What foreign languages do you speak? ______________

Check any special skills you have which you would be willing to share with the Docent Program:

____ typing
____ library
____ writing

____ painting
____ drawing
____ hand lettering

____ sewing
Other ______________
____

AGREEMENT

I hereby agree to:
- * fulfill class requirements of the Docent Training Program
- * become a member of the Desert Museum
- * stay with the program a minimum of two years
- * donate sixteen hours per month

Signature ______________________ Date ______________

Fee paid $ ________ Date __________ Received by ______________

EXHIBIT A

CORCORAN
GALLERY OF ART · SCHOOL OF ART
SEVENTEENTH STREET &
NEW YORK AVENUE, NORTHWEST
WASHINGTON, D.C. 20006
(202) 638-3211

APPLICATION TO DOCENT PROGRAM

Please complete the following form and mail to the Education Department.

Date of application ____________________ Please type or print.

Name ____

Address ______________________________ Zip Code ______

Telephone ______________________________ Age ________

- -

How long have you lived in the Washington area? ________________

Can you be a Docent for at least two years? ________________

Have you ever been a Docent? Where? ________________ Dates ___

EDUCATION:

Secondary School ______________________ Date of Graduation ________

University:

Name & Location of School	Dates	Degree	Major	Minor

List all academic and non-academic art courses (history and applied):

Course	Place Taken	Year

Other courses or training which might relate to work as a docent in a gallery of American art (e.g. American history, American literature, public speaking, education, physical or psychological therapy):

Course	Place Taken	Year

PLEASE ATTACH ADDITIONAL SHEETS IF NEEDED

DOCENT APPLICATION--Page 2 Name ______________________

WORK EXPERIENCE (Professional and Volunteer):

Dates	Place of Employment	Position	Briefly state job duties

List all employment, community activities, or volunteer work in which you are currently involved and how many hours per week you spend on each.

Have you ever worked with the following groups? In what capacity?

Children

Teenagers

Senior Citizens

Handicapped Persons
What handicap?

Other Categories

OTHER INFORMATION:

Do you have children? ______________________ Ages ______________________

Language skills (list only those which you speak fluently):

Other skills:

Are you a practicing artist?

Capabilities in what artistic media?

How did you learn of the program?

Why do you want to become a docent?

155

DOCENT APPLICATION--Page 3 Name ____________________

PROGRAM REQUIREMENTS

1. Docents spend approximately one half-day per week, three weeks per month, Tuesday through Friday, October through May at the gallery.

2. Docents must be available for training sessions on Mondays (bimonthly) between 10:00 a.m. and 2:00 p.m.

3. Docents are required to do assigned readings on the history of art and specific exhibitions. They are responsible for presentation of accurate information in their tours.

4. Docents are required to join the Corcoran Gallery of Art, if they are not already members. (For further information, inquire at 638-3211, x41).

DAY AND TIMES YOU ARE AVAILABLE FOR THE PROGRAM

(Check all days possible, noting times. Star preferred days.)

Monday	A.M.	______	P.M.	______
Tuesday	A.M.	______	P.M.	______
Wednesday	A.M.	______	P.M.	______
Thursday	A.M.	______	P.M.	______
Friday	A.M.	______	P.M.	______
Saturday	A.M.	______	P.M.	______
Sunday	A.M.	______	P.M.	______

CORCORAN
GALLERY OF ART · SCHOOL OF ART
SEVENTEENTH STREET &
NEW YORK AVENUE NORTHWEST
WASHINGTON, DC 20006
(202) 638-3211

EXHIBIT B

Education Department
August 1977

DOCENT TOUR TIME PREFERENCES 1977-78

Name ______________________________

Address ______________________________

____
(Please indicate if there is a change.)

Telephone ______________________________

Please indicate your first and second choices for tour time by putting 1 or 2 next to the appropriate times and days. Mark X by the time you are never available. You must be available for one morning and if possible, one afternoon. No one may sign up for two afternoons.

	Tuesday	Wednesday	Thursday	Friday
10:00 a.m. 11:00 a.m.				
12:15 p.m. 1:30 p.m.				

Mail to: Mrs. John W. McLean
6908 Maple Avenue
Chevy Chase, MD. 20015

FORMS MUST BE RETURNED BY SEPTEMBER 9 in order for the October schedule to be completed.

Thank you.

EXHIBIT C

CORCORAN GALLERY OF ART
EDUCATION DEPARTMENT

DOCENT MONTHLY SCHEDULE OCTOBER 1977

Regular Tour Coordinator — Evelyn Brandt 234-5220
(call between 8:30 - 9:30 a.m.)
Special Tour Coordinator — Dorothy Laybourne 338-8235

	Tuesday 4	Wednesday 5	Thursday 6	Friday 7
10:00 11:00	Nolan Weems Hawkins	Randell O'Brien Owen	Buell McLean Asmar	Brodsky Frank
Workshop				
Alternate	Vance	Cohan	Mazzetti	Laybourne
12:15 1:30	Lilley	Wood	Brandt	Collins
Alternate	Petite	Crossett	Hillman	Joel

	Tuesday 11	Wednesday 12	Thursday 13	Friday 14
10:00 11:00	Fisher Weems Hawkins	Cohan McLean Owen	Fullinwider Vance Brandt	Joel Brodsky
Workshop				Laybourne Mazzetti
Alternate	Marak	O'Brien	Wise	Collins
12:15 1:30	Petite	Skillman	Lilley	Randell
Alternate	Nolan	Wood	Laybourne	Buell

	Tuesday 18	Wednesday 19	Thursday 20	Friday 21
10:00 11:00	Harvey Marak Fisher	Wood Wise	Hillman Cohan Petite	
Workshop	Hawkins Nolan	Skillman Fullinwider	Vance Buell	
Alternate	McLean	Randell	Asmar	
12:15 1:30	Laybourne	Crossett	Hillman	Collins
Alternate	Weems	Laybourne	Brandt	Brodsky

	Tuesday 25	Wednesday 26	Thursday 27	Friday 28
10:00 11:00	Harvey Marak Vance	O'Brien Wise Asmar	Fullinwider Petite Lilley	
Workshop	McLean Weems	Randell Cohan	Brandt Frank	
Alternate	Buell	Owen	McLean	
12:15 1:30	Nolan	Crossett	Hillman	Buell
Alternate	Hawkins	Skillman	Fisher	Joel

EXHIBIT E

LEAVE OF ABSENCE

________________________________ will be absent from

______________________ to ______________________because

____

Send one copy to the Education Department and one copy to Dixie McLean, 6908 Maple Avenue, Chevy Chase, MD. 20015.

****

LEAVE OF ABSENCE

________________________________ will be absent from

______________________ to ______________________ because

____

Send one copy to the Education Department and one copy to Dixie McLean, 6908 Maple Avenue, Chevy Chase, MD. 20015.

The NATIONAL PORTRAIT GALLERY, Washington, D. C. collects its information about prospective volunteers on this one-page form. Further information, when it is needed, is gathered by the Docent Coordinator through personal conversations with the volunteer.

September, 1977

DOCENT INFORMATION SHEET

NAME ______________________

PHONE ______________________

ADDRESS ______________________

____

____

ZIP ______________________

PLEASE NOTE THE DAYS AND TIMES WHICH ARE BEST FOR YOU TO WORK:

SO THAT WE CAN GET TO KNOW YOU BETTER, WILL YOU TELL US SOMETHING ABOUT YOUR EDUCATION, OCCUPATIONAL BACKGROUND, AND OUTSIDE INTERESTS?

HOW DID YOU HEAR ABOUT THE NATIONAL PORTRAIT GALLERY DOCENT PROGRAM?

VOLUNTEER PERSONAL DATA FORM
HIGH MUSEUM OF ART
ATLANTA, GA. - 1975

DEPARTMENT OF CHILDREN'S EDUCATION/THE HIGH MUSEUM OF ART

Name ____
(last) (first) (spouse)

Address ____
(street) (City) (State) (zip)

Phone ____________________ Birthdate ____________________

Children's names: ____________________ Birthdate ________________ (school)
____________________ ________________
____________________ ________________
____________________ ________________

In case of emergency, where can we reach your next of kin?
____

Spouse's business address ____________________ Phone __________

Education

School: ____________	Degree: ____________	Year: ________
____________	____________	________
____________	____________	________
____________	____________	________

Please list any non-credit courses (taken, completed)

1. ____________________ Where: ____________________
2. ____________________ ____________________
3. ____________________ ____________________

JOBS

Please list employers:

1. ____________________ Position: __________ Dates __________
2. ____________________ __________ __________
3. ____________________ __________ __________
4. ____________________ __________ __________
5. ____________________ __________ __________

Page 2

VOLUNTEER WORK

Please list any volunteer work done elsewhere:

	Place	Nature of Work	Dates
1.			
2.			
3.			
4.			
5.			
6.			
7.			

Answer this section only if you have worked in Department of Children's Education previously.

Please list previous volunteer work in Department of Children's Education.

Program	Year

List any offices held, special projects chaired, etc.

( ) High Museum Member

( ) High Museum Members Guild Member

( ) Jr. Committee Member

( ) Young Careers Member

ABSENCES

Date	Absent With Substitute	Absent Without Substitute	Excused	Unexcused

TARDINESS

Date	Excused	Unexcused

CURRENT EXHIBITION TRAINING

Name of Exhibition	Attended Training	Missed Training	Excused	Unexcused

EVALUATION

To be completed by Curator of Education and Program Coordinator twice each working year.

COMMENTS

rapport with children

the oakland museum docent council

_____________ gallery information form

date ________________________ am

supervisor ________________________ pm

docent	shift credit	no. of tours	docent	shift credit	no. of tours
			totals		

name of group & city of origin, including public tours*	reserved		number of people toured				
			group		origin		
	yes	no**	school	other	oak.	alameda co. •incl. oak.•	other
totals							

150

one shift equals three hours.

* do not include special tours• idt, mw, sr.cit., t.c., etc..

** includes any tour not having a reservation slip.

EXPERIENCE AND TRAINING RECORDS:

Volunteer Recognition That Counts

by Pat Hardy

A great deal of talk is being heard in the area of volunteers using their volunteering toward career development or job obtaining. The time has come to offer the volunteer a means of actually making that concept useful and codifiable. This paper shall introduce a form (see page 30) that can be used by the volunteer to record and define experience. Utilization of this form shall be covered, including recording information, understanding the aspects of the individual columns, using the information once recorded, and lastly -- how the coordinator can effectively introduce this form into a program.

RECORDING INFORMATION

All experience, paid and unpaid, should be recorded. Involvement in club activities should not be forgotten. The information should be as complete as possible and recorded at the time of the experience or immediately following it. Obviously if the volunteer is just beginning to record experience, past involvements will need to be researched initially. This is a personal "brag" sheet.

Experience Aspects of Record

Title: The name of the job is crucial to creating a valid position in the minds of future employers. If a volunteer finds that the volunteer job has no title -- the coordinator should be consulted to create a title for the purpose of the form. The created title should represent what the volunteer did...for example, if a person has organized a speakers' bureau, a title might be "Developer of Speakers' Bureau".

Organization and Address: The name and location of the organization is essential. Full zip code, phone with area code and branch or division or department in which volunteer served should be included. This information is frequently difficult to get after one has left the organization, so should be recorded as soon as possible.

Dates and Reason for Leaving: This information is routinely asked on employment forms and in employment interviews, and is very helpful in personal retrospection and evaluation. If a volunteer is finding that leaving an agency is frequently due to boredom or need for new experiences, that will need to enter into job choice. How this is worded should be carefully thought out for future job applications.

Volunteer or Paid, No. of Hours; Pay: Whether the position is paid, unpaid, stipended or expenses paid is significant. The number of hours worked (total or per week or month) should be included to give a measure for the codification and

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Pat Hardy is the Director of Riverside Volunteer Center, Riverside, California.

and comparison of volunteer time. The amount of pay or expenses base (e.g., mileage reimbursement) should be included as well.

Name of Supervisor; Position: Both the volunteer coordinator and the person supervising the volunteer in the agency should be listed. If the volunteer functioned in a loosely structured group -- list the person or group to whom the volunteer was responsible.

Number You Supervised: This category should include those people actually supervised as well as clients actually worked with (e.g., Girl Scout leader supervised 2 assistants and 30 girls).

Job Description: Breaking this out should be detailed, yet concise. My favorite example is the PTA Carnival Chairperson's job description: Public relations, purchasing, budgeting, supervision, program development, community resource development, recruitment of volunteers, mediation, planning, evaluation, report writing.

Accomplishments: This column is an amplification of the job description and adds color and dimension as well as ego strength to the whole record. The uniqueness of the volunteer surfaces here. Some examples are: PTA Carnival Chairperson raised $500.00 more than any previous year, got 20 more groups to participate and the newspaper to cover the event.

Training Aspect Of Form

This part of the tool is designed to keep track of all training, education, and workshops that the individual has attended. It is important to file with this any brochures, catalog descriptions and/or grade cards that relate to a particular course. Conferences attended should be listed and actual programs filed.

Course Title: This area is obvious and generally easily obtainable from advertising material about training.

Instructors: List name, degrees, title of leaders as well as organizational sponsor and location.

No. of Hours/Credit; Length: List total time spent, if college credit was received, certificates or cards received (e.g., ARC Junior Lifesaving Card).

Dates: When did it happen?

Course Description: This should be a brief summary: more detailed program or outline should be attached. If the volunteer has a file system, a cross reference system might facilitate easy recall of course information.

USING THE RECORDED INFORMATION

Once this form is filled out completely, the volunteer can review it and get a clearer self picture. By asking the following questions the volunteer should get an overview of career directions and patterns:

What are consistent patterns in involvement or growth:

Is there any change in direction? If so, why? If no, why not?

What comments can you make regarding the patterns? Examine and stretch the patterns.

What positions have you enjoyed most? Why?

What positions have you disliked most? Why?

What aspects of those positions caused you to like or dislike them?

Now. having looked at the patterns and how you feel about the jobs --- - try designing your ideal job description...including all the aspects you would want in a volunteer or paid position.

Now look at the record and list saleable skills --- this is not a place for modesty or for unrealistically optimistic assessments.

Mesh saleable skills with job description and see if a career goal surfaces.

What skills are needed to reach goal?

What experience gaps are there?

How might either of these be met through volunteering?

These are general and brief questions and should be examined with the expectation that other thoughts and ideas will spin off them.

DOCENT/VOLUNTEER HANDBOOKS

Excerpts from handbooks are included in other sections of this sourcebook; in this section we present substantial portions from two handbooks. One was prepared for art museum docents, the other for volunteers in an outdoor nature/zoological site. We feel that museum educators in all kinds of settings will be able to make transitions of the special considerations in these two books to their own volunteer's work. The tone of respect and the thoroughness of these handbooks are important considerations for those who are setting out to develop their own handbooks.

We have also included some statements of objectives and guidelines for volunteers from a museum that prefers not to have a more extensive handbook. This may help you to decide how much material you wish to give to your volunteers.

The Corcoran Gallery of Art, in Washington, D.C., has a handbook far too extensive to be reprinted in this section. It identifies and counsels volunteers on almost any situation that could arise in their work. If you are interested in a very thorough model, you might wish to purchase the revised edition form the Gallery for $5.00.

The University of Texas Art Museum at Austin has developed a handbook in which, according to one reviewer, "the goodwill of the staff shines through." The handbook is out of print, but can be obtained from the Center for Museum Education in xeroxed form, for $5.00 photocopying charge. (Sections of this handbook are included elsewhere in this sourcebook, and will not be duplicated again in the photocopying.)

In this section you will find:

--The Docent Handbook from the Arizona-Sonora Desert Museum.

--The Docent Handbook from the Tyler (TX) Art Museum.

--a summary of the volunteer program at the Forth Worth Museum of Science and History. While not a handbook in the strictest sense, it covers the responsibilities of guiding and clarifying the role of docents.

ARIZONA - SONORA DESERT MUSEUM

DOCENT HANDBOOK

1976-1977

ARIZONA-SONORA DESERT MUSEUM
P.O. Box 5607
Tucson, Arizona 85703
883-1380

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HISTORY OF THE A.S.D.M. EDUCATION DEPARTMENT

SUMMER CLASSES -- THE BEGINNING

The first formal education programs held at the Desert Museum were environmental education classes for elementary school children. These summer sessions were initiated in 1967 and have been held each year since then.

A NEED FOR AN EDUCATION DEPARTMENT

Although education has always been the theme of the Museum, there were no programs available for school groups visiting the Museum during the school year. If a teacher wished to bring a class for a visit, the group was scheduled by a Museum secretary, a brief form was sent, and that was the end of the Museum-teacher contact. The teacher and students were on their own while touring the grounds.

Some of the classes were well prepared for the trip; others were not. Some of the groups were organized and disciplined; others were not. But most important was the unfortunate fact that the children were realizing only a small portion of the potential Museum experience.

With more school groups visiting the grounds each day and with an increasing number of teachers requesting assistance from the Museum, the need for an education department was evident. In June 1971, an Education Supervisor was hired and an Education Department established.

THE FIRST YEAR

The first year was spent exploring ways the Museum might assist the teachers and children who wished to visit the Museum. A *Teachers' Guide* was written to give teachers ideas they might use which would augment the Museum trip. A filmstrip and accompanying booklet were produced to give classes a preview of what they would see. These teacher-pupil aids helped, but it was obvious that more guidance was needed on the grounds.

The answer was VOLUNTEERS, trained in the basics of desert ecology, who would guide small groups of children on the Museum grounds. Docent programs in zoos and museums throughout the country were studied. Visits were made to institutions with docent organizations as a preliminary to initiating a similar program at the Museum. Guidelines were set up and preparations made to begin our own corps of volunteers.

An education building was imperative if we were to begin a Docent program. The Department could not remain in the small lab within the Maintenance Building. A storage building was converted to an Education Building. The Department moved into the new spacious quarters in April, 1972.

DOCENT CLASSES

In September, 1972 the first Docent training course began. A second was held in spring, 1973. In the fall of 1973, an evening course was held as well as a morning class. The fall of 1974 and 1975, morning and evening sessions were again offered.

The first course was ten weeks in length. The 1973 and 1974 sessions were twelve weeks long; and the 1975 and 1976 courses, fifteen weeks.

EDUCATION DEPARTMENT FACILITIES

The Museum's Education Building is located a short distance from the Museum's main entrance. The building houses classrooms, two offices, restrooms and storage rooms.

The walls of the three classrooms can be opened to form one large room. This is where Docent classes are held and where school groups come to receive additional instruction. Summer classes for children also are held here. Each classroom is equipped with a sink, laboratory apparatus, bulletin and chalk boards, tables and chairs.

Adjacent to the classrooms are the offices. The Docent Room is equipped with desk, telephone, sink, bulletin boards, library and comfortable furniture. Here the Docents can relax, enjoy a cup of coffee, study, and visit.

Next to the Docent Office is the office of the Education Supervisor.

THE TRAINING PROGRAM

Docent trainees meet one morning (or evening) a week for fifteen sessions. Classes are held in the Education Building on the Museum Grounds. Museum Curators are the instructors. The theme is ecology with an emphasis on the Sonoran Desert (its causes, its geology, and its life forms), adaptations of plants and animals to desert conditions, and interrelationships among life forms and the environment. Museum philosophy, touring hints, and teaching methods are also included in the curriculum.

To augment the lessons, the trainees observe Docents with school groups and later take groups of their own as an experienced Docent looks on. Fact sheets are provided which give specific information about plant and animal species, geology, and Museum exhibits.

A mid-term and a final exam test the trainee's knowledge. A Graduation Ceremony is held in the Demonstration Desert Garden after successful completion of the course.

After graduation, the trainee becomes a Provisional Docent. The following October a presentation of name badges marks the end of the provisional period. Those who have fulfilled the provisional requirements become Desert Museum Docents.

DOCENT DUTIES

Touring groups, displaying a live animal on the grounds, teaching a special program in the Museum classrooms, making a presentation to a class at a school, assisting in the Van Program, and talking with the Museum visitors are the Docents' primary concerns. However, there are, on occasion, other non-teaching jobs throughout the Museum that utilize Docent help. Office work, assisting the Curators with chores, working in the animal nursery, photography and art projects are but a few of the tasks carried out by Docent help.

CONTINUING EDUCATION

September through May, on the first Wednesday of the month, additional classes are offered to the Docents. Instructors are Museum Curators, University of Arizona faculty and staff and members of the community.

The purpose of the classes is two-fold. The information gained from the lessons is used by the Docents in their work, and the meetings keep the interest level and enthusiasm high among the group. An additional benefit is a social one. This is the one time each month when everyone can get together and exchange greetings.

Nine classes are held each year. Attendance at seven is required. All lessons are taped. The cassettes are filed in the Docent Room and can be checked out.

DOCENT COUNCIL

The Docent Council was created to facilitate directing and coördinating the work the Docents do for the Museum. From this arrangement the Docent Council evolved.

Membership in the Docent Council is limited to Docents with active status.

All activities, decisions, and policies relative to the Docent Council are subject to the approval of the Museum Director.

STANDING COMMITTEES AND RESPONSIBILITIES

Docent Chairmen and Education Supervisor are ex-officio members of all committees. Chairmen and members of all committees are appointed by the Executive Board. Appointments are for a one-year period from May to May.

Application and Training Committee
Members of this Committee give all applicants for the Docent program an introductory tour of the Museum and a briefing on Docent programs, plans and responsibilities. This Committee will designate a sponsor Docent for each Provisional Docent.

Finance Committee
The Treasurer is the chairman of this Committee whose responsibilities are to handle the collection of money and maintaining of pertinent financial records relating to Docent activities.

Library Committee
Docents who work in the Museum and Docent libraries comprise this committee.

Membership and Records Committee
The Secretary is chairman of this Committee. The Committee compiles hours and handles record-keeping duties for the Docent Council. The Committee is authorized to consider special requests dealing with status and Advanced Class attendance.

Newsletter Committee
This Committee will issue the Docent newsletter on a regular basis.

Touring and Grounds Committee
The Committee's responsibilities are to facilitate touring and grounds assignments, and to maintain necessary records and reports. Daily captains coordinate the program.

Visiting Docents Committee
The Docents who visit the community with animals and displays that are kept in their homes comprise this Committee. Members of this Committee conduct workshops and monitor each other's programs to upgrade presentations.

Education Department Animals Committee
The Committee is responsible for the care of the Education Department animals.

Sonrisa Committee
This Committee handles special correspondence with Docents.

Hospitality Committee
The chairman of this Committee is in charge of refreshments for Docent activities.

AD HOC COMMITTEES

Nursery Committee
This Committee is responsible for staffing the Nursery when requested to do so by the Museum staff.

DOCENT COUNCIL MEMBERSHIP STATUS

There are two categories of membership status -- active or inactive -- determined by the following guidelines:

Active--
To be considered an *Active* Docent it is necessary to:
- Maintain Museum membership.
- Fulfill requirements set down under *Responsibilities Accepted by a Docent*.

Inactive--
During the Docent year if a Docent cannot meet the requirements for *Active Status, Inactive Status* may be retained by:
- Submitting a request for *Inactive Status* in writing to the Membership and Records Committee.
- Maintaining Museum membership.

Inactive Docents will receive no mailings unless a request is made to the Education Department Secretary.

REINSTATEMENT TO *ACTIVE STATUS*

A absence of 6 months requires review and self-testing. An absence of over 6 months requires attendance at 3 designated lectures or listening to 3 designated tapes of lectures, self-testing, and a brush-up tour with another Docent.

Docents who have been absent from *Active* duty and have not requested *Inactive Status* will be dropped after a two-month grace period.

A membership status and scheduling sheet will be mailed in August.

PLEASE NOTE: EXCEPTIONS TO ALL THE REQUIREMENTS FOR RESPONSIBILITIES ACCEPTED BY A DOCENT AND STATUS WILL BE DETERMINED BY THE MEMBERSHIP AND RECORDS COMMITTEE. Inquiries about or requests for exceptions may be directed to the Education Supervisor, Docent Chairman, or the Chairman of the Membership and Records Committee.

RESPONSIBILITIES ACCEPTED BY A DOCENT

During the Provisional period, from the end of the Docent Training Class in February to October, each Docent agrees to:

Tour twice a month; if no tours are scheduled, ground patrol or duty in the Docent Enclosure may be substituted.
Donate sixteen (16) hours of service per month including travel time and Advanced Class. This time may be divided up as convenient for the Docent. It is requested that Docents set up a schedule of specific times and notify the office if any changes are necessary.

Midway through classes each Provisional Docent will be assigned a Sponsor Docent who will assist the trainee in getting acquainted, general orientation, and practice touring.
Each Provisional Docent is required to complete two observing tours and two practice tours with an Active Docent. The tours must be completed before date of graduation from Docent Training Class.

During the second year of service and thereafter each Docent agrees to:
Conduct one tour a month and be available for an additional tour if necessary. Additional jobs should be scheduled around tours whenever possible.

HOURS WHICH MAY BE CREDITED TOWARDS MUSEUM SERVICE

Donate a minimum of sixteen (16) hours of service per month during the Docent Year (September 1 to June 1) or 144 hours per year. This includes travel time and Advanced Class.

ACTIVITIES WHICH MAY BE INCLUDED IN CALCULATING HOURS

a. Touring. When touring a regularly scheduled group ... if no tours scheduled, ground patrol or Docent Enclosure. If at the Museum with guests, hours may not be counted even though the Docent may "pick up" visitors while touring his/her guests.

b. Work at the Museum such as the library, nursery, assisting in the various departments, helping with Museum functions such as Members' Day, and Educa- Department projects such as posters or compiling materials for the van.

c. Work at home requested by Museum Departments such as writing, making posters, special projects requested by departmental heads.

d. Participating in any of the Education Department programs in the community such as the Van Program or the Visiting Docents.

e. Attendance at meetings, visiting other institutions, or participating in special programs when done so at the specific request of the ASDM or any of the Departments. Only time spent in formal activity (meetings, lectures, conferences, seminars, workshops, consultations, etc.) is to be counted. Not to be included is travel time or time devoted to casual recreation or extra-curricular activities which may occur in conjunction with such trips and visits.

f. Staffing special programs or displays for the Museum such as the Flower Show, Museum booth in El Con, etc.

g. Hours attending classes or listening to required tapes as necessary to resume active status or to fulfill Advance Class requirements.

SPECIFIC RULES

When you are working on the grounds as a Docent you are representing the Museum. We request that the women do not wear shorts or short skirts, or low-cut blouses, and that the men keep their chests covered even if it is only with a T-shirt. Do not wear clothing or accessories made from animal skins. Do not wear novelty clothing or accessories of questionable taste. Neat, comfortable sportswear is a good compromise between practical considerations and appearance.

Staff members are not allowed to have their families with them when they are working and this rule applies to Docents also. When you are on the grounds with family or guests you may wear your pin and assist other Museum guests if you wish; but on your regular duty days, please, leave family and guests at home. Only Docents should answer questions or give information to the public. Guests or families must observe this rule when with a Docent.

Docents are requested to eat in the staff lounge unless they have guests with them. When you have guests, you may eat in the restaurant.

Please do not bring children to the classes. They are distracting to the rest of the group.

Do not smoke while touring, working on the grounds, or representing the Museum in the community. We also request that you do not smoke during the Docent lessons.

Docents who wish to work on the Van Program, as a Visiting Docent or to exhibit animals on the grounds must attend the appropriate workshop.

A Time Sheet with a record of your hours must be kept in your folder in the Docent office. When working, please sign in and out in the Docent office.

Only the Education Supervisor and Secretary are authorized to answer the telephone in the Education office.

If you have any questions regarding Museum policy or a particular problem, please feel free to talk to the Chairman, Chairman-Elect, Education Supervisor or Education Secretary.

LIBRARY REGULATIONS

The regulations for Docents borrowing books from the Museum libraries are as follows:

Docent Library
While Docent Training Classes are in session, one book at a time may be signed out for a one week-period. If more are needed, permission must be obtained from the Education Supervisor or Education Secretary.

After the training session the loan period will be increased to two weeks.

Docents are responsible for returning their books on time even if they do not come to the Museum every week.

Museum Main Library
Books may be borrowed overnight only by Staff and Docents.

Docents checking out books must arrange for their return the next morning.

Other Museum members are welcome to use the library for reference, but may not check out books.

TOURING GUIDELINES

The Daily Captains shall be informed as to which Docents will be working on a given day. Docents are expected to notify the Daily Captain if unable to come to the Museum on their scheduled day, or should indicate the days to be absent on the proper calendar in the Docent office. Any attendance problems the Daily Captains are unable to handle should be referred to the Chairman of the Touring and Grounds Committee (BettyAnne Wheeler, 297-1579). The Daily Captain is responsible for assigning duties to Docents on the grounds, greeting groups on arrival at the Museum, designating Docent guides for tours, and generally supervising Docent work on the grounds.

The earliest hour a group can expect to be toured is 9:30 a.m. Docents need wait no more than one-half hour past the scheduled time of arrival.

The Daily Captain reports on the tours and transmits any necessary information to the Education Department.

The Environmental Education Van program was started in the fall of 1974 with a gift of $45,000 from the Junior League of Tucson. Two small vans were purchased and equipped with Audio-Visual Aids. Presenting natural history lessons in the classroom, with emphasis on the Sonoran Desert, is the primary purpose of the program. Programs also are presented to other groups in the community.

VISITING DOCENTS PROGRAM

The "Visiting Docents" are Docents who go out into the schools in the Tucson area and present an individualized program to a classroom.

Usually the Docents use a few small animals such as a tarantula, gopher snake or pocket mouse for their presentation, although they may also make use of animal skulls, plant material or slides, depending upon the request of the teacher.

The program is usually one half hour to an hour in length. The Docent gears his or her presentation according to the age and background of the class.

ADMINISTRATION

Robert M. Craig, General Curator
John D. Jameson,
Chief Administrative Officer
Lawrence McFaddin, Development Officer
Carla McClain, Public Relations
Elizabeth Powell, Administrative Assistant
Grace Mesel, Development Office Secretary
Cheryl Northam, Receptionist/Typist
Barbara Rote, Administrative Secretary

Virginia Moe, Assistant Treasurer
and Controller
Hazel O'Dell, Head Bookkeeper
Nancy Gagliano, Bookkeeper
Victoria Cundiff, Receptionist
Diana Englet, Membership Secretary
Paula Shin, Business Office Assistant

Jack Satterthwaite, Ticket Office
Attendant
John Hackett, Ticket Office Attendant

BIRD AND MAMMAL DEPARTMENT

Charles Hanson, Curator
Dagmar Sommer, Head Keeper
Rusty Diehl, Keeper
Rick Shore, Keeper

Ira Weisenfeld, D.V.M.
Veterinarian Consultant

BOTANICAL DEPARTMENT

Donald Ducote, Curator
Robert Perrill, Head Assistant
Richard Kazmier, Assistant
Thomas Peabody, Assistant
Martha Wiseman,
Plant Catalogue Project

EARTH SCIENCES

William Panczner, Curator

EDUCATION DEPARTMENT

Doris Ready, Supervisor
Maxine Peirce, Secretary

TYLER MUSEUM OF ART

FOREWORD

In preparing this manual, it has been my hope that it would be, in every sense a docent book. It is intended to be informative, practical, and above all, _your_ book. A great number of recommendations and reactions from experienced docents have gone into its preparation.

It is intended also that the notebook format will enable you to make this a docent book through the addition of your own material. Clippings, class notes, log entries, random thoughts: these are just some of the things you may choose to add. In time, as you add New Show Information Sheets and other writings to the book, it will grow to be an encouraging record of your involvement in the docent program.

I am very grateful to all those who gave their time and care to the planning and editing of the present manual. Without your contributions, the content of this book would have been greatly diminished and my task in writing it all the harder.

Barbara Meyer
Summer 1977

WHO'S WHO AT THE MUSEUM

The trustees are members of the community who are chosen to serve on the board for their abilities and interest in the art museum. As a group, they are responsible for overseeing the museum's operation and management and for insuring its continuation. They hold the museum in trust for the public and can be held personally liable should they fail to perform their duties adequately. New trustees are elected by the board and serve a three year term.

Ron Gleason, director, is responsible for the administration and maintenance of the museum and its programs. Ron plans the budget, oversees fundraising activities, and manages expenditures. He works closely with the two curators on exhibition and education programming. When his other duties permit, he enjoys helping with tours.

Before coming to Tyler, Ron was director of the Wichita Falls Museum and Art Center. He is a member of the Visual Arts Panel of the Texas Commission on the Arts and Humanities and serves as a consultant on administration and management for other museums and the Texas Historical Commission.

Mike Dillon, curator of exhibits, plans and installs all exhibits. He is concerned not only with selecting and arranging exciting and inviting exhibitions, but also with more mundane matters of insurance, security, and crating. Mike also helps with tours and leads special workshops on print-making technique and connoisseurship.

Mike is a print-maker and sculptor with several years teaching experience. A graduate of Midwestern University, he recently earned a Master of Fine Arts degree in sculpture and print making from the University of Dallas. His work has been included in a variety of regional and national exhibitions.

Barbara Meyer, curator of education, develops and maintains the museum's education programs. In addition to fulfilling the administrative tasks which make these programs possible, Barbara gives tours to a variety of group and individuals and trains volunteer tour leaders.

Barbara holds an A.B. degree in French History and Literature from Harvard University and a graduate degree in museum education from George Washington University. Her experience includes a training internship at the Smithsonian Institution Traveling Exhibition Service and exhibit preparation work in Washington, D.C. and Boston, Massachusetts. Recently, she has served as a consultant to the Docent Program of the Wellesley College Art Museum and been a member of the Board of Directors, City Museum Project, Washington, D.C.

Barbara is a member of the Historic Preservation Board of Tyler and is active in the Azalea District Civic Association and the American Association of University Women.

Judy Pirtle is the museum's administrative assistant. Judy handles all the museum's secretarial work, billing and bookkeeping. A Tyler native, she enjoys greeting museum visitors and working with volunteers.

Tom Gingrass, maintenance engineer, is in charge of building maintenance. He insures that the building stays clean, repaired, safe and evenly heated or cooled. Maintenance emergencies or problems should be reported to him. Tom is working on an M.A. degree in Inter-disiplinary Studies with a specialty in art at Texas Eastern University. Until recently, he worked for the museum as a guard-guide.

The guard-guides are weekend employees who are responsible for security and for greeting and assisting with visitors during our weekend hours. The guard-guides also help provide security staff for openings and other special events.

The Advisory Council is a group of people who are interested in the museum and its future. They meet at intervals throughout the year to learn about the museum's activities and plans and to provide the staff with community response and in-put for planning.

QUESTIONS NEED ANSWERS: KNOW YOUR MUSEUM

Now that you are more closely associated with the museum, you may find that people ask you questions about it. The questions listed here are the most frequently asked. Prepare answers now, so that you, too, will be "in the know."

When was the museum founded?

When was the building built?

Who were the founders?

Who designed the building?

What does the building contain?

How large are the galleries?

What does the museum offer the community?

Does the museum have a collection?

What does the museum exhibit?

What are the main educational activities?

Who runs the museum?

Who are the trustees?

Who is on the museum staff?

How is the museum funded?

What is the annual operating budget?

Does the museum have an endowment fund?

When is the museum open?

What does it cost to visit the museum?

How do I book a tour?

How do I get on the mailing list?

Who may use the library?

Where are the restrooms?

Where are the water fountains?

Where is the pay phone?

GOALS OF THE MUSEUM VISIT PROGRAM

--to demonstrate, through experience, the potential rewards of a museum visit.

--to introduce the vocabulary and basic skills of art appreciation.

--to increase the student's knowledge of how an artist works.

These goals will be defined and met behaviorally through the interaction of docents and children as teacher-learners in the galleries and art classroom.

DOCENTS: A LOOK, THINK AND LEARN LIST

1. LOOK at everything (until you're sure you're looked out). Make a special effort to look at art. Spend time in the TMA galleries. Visit the museums in Longview, Dallas, and Fort Worth. Make an effort to respond to art and explain your response. Look critically at the design of print media: a newspaper page, a magazine's use of color and collage, the meaningful components of an advertising image. Look at fruits in the market, a splash of Kool-Aid on the kitchen floor, the moon rising over McDonalds--anything. Just look!

2. Ask questions. Know what you don't know and then change that. Ask people: Barbara, Mike Dillon, Ron Gleason, an experienced docent, or others. Use books. Use your eyes: art provides its own information.

3. Read: critically. Sample, explore, discover. Don't try to absorb the entire library in a weekend. Reading a single chapter and mulling it over for a few days can be far more helpful. You know what you know: structure your own reading program. The docent library (bottom row of library shelves) is just a start. See Barbara for advice and to ask about other books she may have.

4. Write: It's important to keep a log of art related experiences--questions and answers; notes, discoveries, puzzles and wonders; art gossip from magazines, newspapers, the supermarket, wherever you've found it; observations and descriptions of your environment; responses to an exhibition or single work of art. The log is yours to make and develop. The docent work sheets provide ideas and exercises that may generate log material for you. A faithfully kept log will reward you as it grows, reflecting your development as a docent.

WATCH AND THINK ABOUT CHILDREN

Watch *Sesame Street*, *The Electric Company*, and other children's television. Compare cartoons and *Sesame Street*. Consider the impact of motion and music on a visual image. Try watching a show with the volume off. What happens? How do Saturday morning cartoons ressemble coloring books?

Watch children playing. Try to be at a distance or so much a part of the scene that your presence is not disturbing. How do children form groups? Can you identify a leader without listening in? Watch movement: small gestures, big motions. Be aware of language. Do children use other forms of communication besides spoken English? How do children control one another? How long does a child stay with one activity? Good places to see children: playgrounds, supermarkets and shopping centers, churches. Children in a library can be fascinating.

Look at children's art. Can you identify the stages described by Lowenfeld? Compare a child's formulas for houses, trees, people, etc. to the outlines provided in coloring books. If you can, watch young artists at work. Watch eyes, hands, concentration, speed. Does a child seem to be following a preconceived plan for a work or does it develop, more haphazardly, as a response to the medium?

Recall your own experience as a child artist. Did you paint? Draw? For how long? Did you complete coloring books? Did you draw or paint at school? How did you feel about directions and criticism? What should have been different?

Recall a field trip you took in school. What happened? Were you aware of any purpose of goal for the expedition? Can you remember *why* unruly behavior occured? What could have been done to change or improve the day?

VOLUNTEER WORKERS AND DOCENT STANDARDS

The volunteer worker is a very special person in our society. Without the services of volunteers, many of our most cherished and necessary institutions might cease to exist. That is certainly true in museums, where limited budgets require that the capabilities of paid staff members be extended by volunteer efforts.

I trust that every volunteer at the Tyler Museum of Art will recognize the importance of his or her service to the museum, and as a function of that importance, adopt the attitude of the volunteer professional. A volunteer professional takes the same pride in his or her work that a paid professional would. A volunteer professional expects to be accorded the same respect and working conditions that a paid person receives. A professional volunteer is committed, reliable, and cooperative. In short, the only difference between a paid and a volunteer worker should be the reward for work. Volunteers must be large enough of spirit to measure their rewards in intangible terms of creative satisfaction, acquired skills, and fulfillment of personal needs, potential, and ambition.

As a Tyler Museum of Art docent, please be willing:

To meet the weekly work commitment of two hours.
To arrive promptly for scheduled tour assignments.
To be dependable about doing your tours and conscientious about notifying the curator of education well in advance if you must cancel.
To make every effort to find a replacement if you cannot do a tour.
To attend all training and new show briefing sessions.
To learn as much as possible about exhibitions and to impart to the public only information which you know to be true.
To accept the museum's right to dismiss a docent for poor performance, including repeated and willful spreading of misinformation or poor attendance.

Meeting these standards will increase both your service to the museum and the benefits you receive from your participation in the docent program.

TIPS FOR TOURING

At the Tyler Museum of Art no two tours will ever be alike. A successful tour depends on the interaction of many variables: the personality and preferences of the docent; the age, mood, contributions and responses of the students; the art on view; and even such apparently unrelated factors as time of day and weather. A skilled docent is sensitive to all these elements and works to find ways of combining them in an enjoyable and effective tour.

There are no established scripts and no exact formulae for acheiving a perfect tour. There are, however, general patterns to follow and critical events to control. These tips for touring are not a recipe to be followed precisely, but rather a list of ingredients to combine as you work with different exhibits and groups of children.

I. BE READY TO TOUR!

A. Know the show

- * Read--use library resources and docent training materials before a show opens.
- * Look--what's there? What do you like or dislike? What was your first impression and how do you think children will respond? Question TMA staff. Determine good starting and stopping places. Have something to say--a challenge question or interpretive goal--for each work.

B. Be ready to work.

Arrive on time: 15 minutes ahead of tour. Put away coat and purse, get smock and name tag.

Check the docent bulletin board.

Check the classroom, confer with other docents.

C. Be upstairs. Energy up and mind set to go!

II. Parts of a Tour

1. Greetings and trip downstairs to classroom
2. Classroom warm-ups
3. Walk to galleries
4. Gallery Tour
5. Finishing up

Each of these parts is important, although they vary in time allowed.

III. Specifics

A. Greetings

Control the door. Have someone hold it open. Station a docent between the group and the balcony wall.

Say hello and explain that they are going to the classroom for a few minutes.

B. Classroom Warm-up

The goal is to make the children feel at home and prepare them for the tour.

Settle group down. Watch for tipping chairs!

Welcome them.

Fine out who they are and what they know about the museum and the plan for the day.

Introduce the exhibits. Make it exciting.

Throw out a learning challenge: "Do you think you can discover what a lithograph is?"

Review the museum rules. Be patient enough to let the children define them. They will, in time, reinvent our three rules.

If time allows, play a looking game.

Divide into groups. While one docent leads the warm-up, others should watch the children. An observing docent can discover troublemakers and other potential difficulties and divide the group accordingly.

C. Off to the galleries!

Use the time. Try:

* Calling attention to the environment. Talk about the building, about lines and shapes, about light and shadow.

* Get rid of excess energy. Stop for a stretching, ten quick jumps session. Shake out all that restlessness (shake arms until children agree that they've gathered all the wiggliness they can and then direct them to slide it down through their fingertips to the floor).

* Become better acquainted. Talk with the children, walk close to a shy one or a straggler, walk between two promising troublemakers. Make friends.

D. In the gallery.

- * Vary pace.
- * Pay attention to physical comfort. Keep group moving, sit down,stand up, don't ask them to look at what can't be seen, don't obstruct a work of art with your body.

  Can they hear you?

  Does anyone in the group have a vision problem?
- * Wait for responses/reactions from the children. Respond to these.
- * Lead the children to discoveries. Encourage them to take over the discovery process of close and careful looking leading to seasoned conslusions.
- * "A Good Docent Never Tells--too much." One fact or concept at a time, please. Measure out your information with great care.
- * Spread yourself around. Pay attention to the whole group. Question silent children. Don't be trapped by a "Hey, Look at Me" star.
- * Reinforce. Build on what you've taught.

  Recall other works, earlier concepts learned.

  Check that the children are learning about techniques or process by asking them to guess how a work was done. "Who can tell me how........?"
- * Remember that art is about ideas, visions, discoveries,

creativity, accidents, dreams, mysteries. It's about being human. Create some excitement or a sense of wonder. Don't leave out the magic!

E. Tour Themes

Use these to structure your tour. Focus on one or include a little of each.

1. Learning to look (perception and analysis)
   - * Looking for parts and wholes
   - * Touching with our eyes--
2. New words or new uses for old.
   - * Vocabulary
   - * Equipping children for the delights of shared looking.
3. Art's ways and means
   - * How the artist works--mastering a technique, creating a visual image or design.

   What's this about and how well was it done?

F. Finish up.

A good tour is made of many beginnings and many endings. Each work of art approached requires a fresh start, another look and, ideally, your conversation at each work will be brought to a logical conclusion. A series of small conclusions will carry you to the end of the tour.

Let the children express their own summary.

Ask: What did we see?

What did you like?

Did you learn something new?

Will you come back again?

Finish for yourself. Evaluate. "How did I do?" is a question whose answers depend in part on these questions and their answers:

What did I do?

Did I follow the "Tips for Touring?"

What did the children do?

What was said? How did everyone behave?

Can you prove it was a successful tour? How or by what measure? Sometimes a good feeling is enough.

THE THREE MUSEUM RULES

1. Don't touch the art.

   Because touching hurts it, even if you can't see the harm done.

2. Don't run.

   Because we would be sorry to see you come to harm in an unfamiliar place.

3. Be considerate of others. Don't distrub their looking.

   Because looking is the most important thing that happens in a museum. Making noise, interrupting, fighting and other "silly-stuff" are all covered by this rule.

These rules help us care together for the art and for one another. The Tyler Museum of Art is Y-OUR place (yours, mine, ours) and we all have a share in its care.

Docent Training Program -- Fall, 1976

Goals, Key Features, Syllabus.

The purpose of the docent training program is to prepare a group of volunteers to act effectively as tour leaders for fourth graders and other groups of visitors. Docents will also be trained to lead art workshops for fourth graders.

Definitions:

A. Tours--visual explorations of art exhibited in the galleries, using multi-sensory and dialogue teaching techniques to develop "improvisational" tours.

B. Art Workshops--opportunities for children to gain first-hand knowledge of the techniques and media involved in a given exhibition. In most cases, this will mean "hands on" experiences using materials and processes like those found in exhibited art. In some cases--complicated print techniques, for example--it may be necessary to arrange a demonstration.

The training program will produce "gallery teachers" or tour leaders who are capable of introducing children to their own abilities to see and appreciate art. The workshops will be designed to supplement the gallery experience, and constant reference will be made from one to the other. To insure that relationships are clearly drawn, all docents will be required to work with a group of children in both the galleries and the workshop.

The training program is designed to increase the docents' competence in four knowledge areas:

1. Professional--overall knowledge of the standards and procedures of the school visit program. This ranges from a general knowledge of the museum and docent responsibilities within it (responsible for visitor safety, not responsible for exhibit program) to a specific knowledge of performance standards: to be on time, to cover all tours agreed on, to meet training and evaluation requirements.

2. Audience and learner-teacher psychology--includes age levels, expressive abilities, values; group contact and control; theories of learning and teaching.

3. Art--its forms and approaches. Leading to an ability to acquire "expert" background knowledge about an artist or school with an equal ability to approach

and explore any work of art without regard to background material. Depends on an inventory of basic elements found in all art as well as in specific types and works of art.

4. Repertoire of Interpretive Techniques--Ability to structure a tour, inspire questions, build a free-form but purposeful dialogue. Knowledge of tried and true sensory and dialogue techniques. (Contribution of docent's own ideas, perceptual games).

Key features:

a. Professional and personal development of docents. Growth from ordinary volunteer to committed, trained, competent docent. Increased awareness of art and increased personal confidence through training and gallery performance.

b. Seminar, discussion format: problem solving approach insures greater consciousness of own and others' learning process. "We teach as we are taught."

c. Self evaluation: Gallery communication techniques will be taught so docents can evaluate themselves and one another. Docents will contribute to the articulation of performance standards. The curator of education will monitor docent progress through observation and conferences: emphasis will be analytical, not critical.

d. There will be two streams of training for experienced and novice docents, rejoining for briefing sessions after initial training is complete. The "New Show Briefings" will be training sessions for new exhibitions and will consist of a curator's tour and group discussion of improvisational strategies to use with each work of art. The Novice Docent training program consists of eight two-hour sessions. The Advanced group program consists of at least four review sessions with attendance at Novice classes suggested.

That a Folsom spear point was made by a man can be determined by feeling its serrated edges and the deep groove down its center. But knowledge and understanding of how that man lived must be acquired from sources other than intuition and deduction.

At a museum it is possible for someone with knowledge, enthusiasm, and imagination to explain to a school group that 10,000 to 15,000 years ago a small man sat near his fire quietly chanting a song he believed would help his chipping and hunting. With a small stone and the tip of a deer antler, he slowly and carefully chipped on a special stone he had brought from the mountains many months ago for this purpose. He knew exactly what he was doing because his father and uncle had taught him well when he was a very small boy. He made several good points because tomorrow he would hunt with the other members of his family for the big buffalo or maybe an elephant if they found one ill or injured near the swamp. He was confident he would succeed this time; he had seen buffalo this morning. He had to succeed because no one in his family had had meat for over a month. Everyone was hungry, the roots and berries gathered by his sisters and cousins just did not give him strength----- the story can go on.

The excitement of objects in a museum can be passed on only by people interested in other people. The knowledgeable and enthusiastic docent makes a museum live. This docent handbook is intended to get you started on one of the greatest adventures of your life--- learning and sharing the joy of discovery with children.

THE CHALLENGE

Dictionary definitions of docent are varied and sometimes confusing. The key words, in any case, are unpaid and lecturer. Although the term originated in European universities, museums throughout the United States long ago adopted it as a particularly appropriate appellation for the volunteers who lectured to their school groups.

At the Fort Worth Museum of Science and History, a docent is not only a lecturer but a viable link between the students and the exhibit halls, which at first glance may appear almost overwhelming to young newcomers. Through the use of artifacts for the students to touch and background information to stimulate their interest in the topic, the docent can, in a very real sense, open the doors of the mind to learning experiences that simply are unavailable elsewhere.

Surely no higher challenge can be issued to people in the community who have much to give and who are looking for a worthwhile outlet for their energies. The reward: the light of understanding and awareness in a child's eyes or his eager questions or his simple "thank you" when the hour has ended.

THE PREPARATION

For ten days in September (the 10th through the 21st), the entire staff of the museum will be available to consult with docents in a series of seminars designed to provide answers to all questions--except, of course, to those puzzlers still plaguing staff members--and to familiarize the participants with museum programs and functions.

After the first five days, docents will choose the area in which they wish to work--natural science, geology, astronomy, medical science, or history. During the final five days, the seminars will provide concentrated study and practice in the docent's chosen specialty. Here again staff members will be on hand to advise, to inform, and--perhaps most important of all--to reassure.

Lists of suggested books and periodicals (many of which are in the museum library) will be provided during these sessions, and docents will be encouraged to branch out for themselves seeking available resource material. It is more than a truism that knowledge of the subject matter at hand fosters self-confidence when the time comes to face the students. This does not mean that one must be an expert in the field, merely that one must be continually expanding his store of knowledge.

Additional seminars will be offered during the year as occasions arise: for example, the return of a docent or staff member from a rewarding visit to a foreign land or another part of this country. And the museum staff will stand ready throughout the year--not just during the seminars--to provide information, encouragement, and a sympathetic ear.

Watching others give lecture-demonstrations is an indispensable beginning for the embryonic docent. By observing a museum staff member, the docent can see a professional in action and thus establish a standard of excellence. By sitting in on a lecture given by another docent, the beginner can ascertain that it is not necessary to be a paid museum worker to be a good teacher. Under the most propitious circumstances, the new docent ultimately will develop an individual approach, tempered by observation, experience, and wisdom.

THE UPS AND DOWNS

Above all, the docent must remember that the students are in a museum, not a school room. Here, boys and girls can stroke the skin of a boa constrictor, watch the evening sky as it was 2,000 years ago, and literally feel the antiquity of a Pre-Columbian culinary vessel. These are truly unique experiences for them, and the wise docent will make full use of artifacts, animals, and objects to awaken drowsy sensibilities.

Ideas, as well as experiences, can arouse the students from their lethargy. Often they are intrigued by little known facts about members of the animal kingdom or peoples from other cultures--the pint-sized armadillo sounds like a bull elephant going through the brush; prehistoric Indians made baskets long before they made clay pots. Nuggets of this sort can provoke spontaneous questions and thus perhaps lead the docent along more profitable avenues than the original map called for.

Obviously, then, lectures should never be memorized. A general plan must be developed and kept loosely in mind, but the successful docent is the one who remains flexible. Different groups will respond differently to a topic, according to such things (besides the obvious) as the weather and the time of year. Students coming to the museum just before the Christmas holidays, for example, can seldom be compared to those in the spring. Children, too, often are restless when a storm is brewing.

The "obvious" mentioned above pertains to grade level and special groups (exceptional, bi-lingual). Usually, the approach that works with a third-grader will not prove successful with a sixth-grader. Similarly, the language barrier may call for a more detailed explanation in the bi-lingual class. Whatever the level, the students do not like to be talked down to. Neither, on the other hand, do they care for the "let's be buddies" approach. In most cases, they appreciate the teacher who is cheerful and enthusiastic, who is enjoying the experience, who is not afraid to say "I don't know" to a question.

Another aid in establishing the proper atmosphere is a well-planned schedule. The docent who arrives at least fifteen minutes ahead of the school group is almost certainly more relaxed than the one who rushes in at the last minute out of breath and filled with apprehensions about the latest crisis at home. Correspondingly, at least the same amount of time is needed after the lecture to sort out in the mind the strengths and weaknesses of the presentation and to put away teaching materials properly. One further point: the docent should appear at the appointed time, because the students surely will. Nothing short of a dire emergency should be considered grounds for backing out on such a commitment, in which case the docent should feel responsible for securing a replacement.

Lecturers should dress neatly but comfortably and without ostentation--pants suits are ideal for the docent, who is often called upon for physical as well as cerebral activity. It is well to remember too that excessive amounts of jewelry are distracting--and sometimes even offensive--to youngsters.

Occasionally, things simply will not go as planned. A group may be late; it may be larger than expected; the students may be unruly. Again flexibility is the answer: (1) abbreviate the lecture-demonstration (never penalize the next group by going over into their time); (2) talk louder and smile more; (3) remind them politely, but firmly, that the presentation will be terminated early unless order is maintained.

Some days the docent, rather than the students, will be out of tune. Any experienced teacher will testify that there are bad days and there are good days and that neither is cause for more than momentary depression or exultation. After all, there is always another day. Here is where a carefully nourished sense of humor can surface to save the day. Without one, the situation can indeed become grim. With one, the docent can survive.

EVALUATION OF VOLUNTEER PERFORMANCE

Ellen Strauss--organizer of CALL FOR ACTION-- points out that volunteers have a RIGHT to evaluation of their work. The word "evaluation" however, calls forth mixed emotions from many volunteers and many museum educators. The key questions are WHAT is to be evaluated, and HOW is it to be done?

Several of the authors in this section propose that volunteer performance cannot be evaluated in a vacuum; that volunteer performance is only as good as the training and management provided by support staff encourage it to be, and that if volunteers are to be evaluated by their supervisors, they should in turn evaluate this supervision.

Other museum educators approach evaluation on what might be called a "contractual" basis: that is, the volunteer is informed, from the beginning, of exactly what skills will be evaluted, and then given the training and support that will enable her to develop these skills. The most desirable aspect of contractural evaluation is that it assures the volunteer that she is not being judged personally. In addition, when evaluation is incorporated in the course of training--formative evaluation--it becomes a useful tool rather than a threatening climax.

In this section you will find:

--an article on evaluating docent performance by Flanders and Flanders, reprinted with the permission of Curator Magazine;

--results of the Oakland Museum Docent Council's evaluation survey, and the Council's 1978 Tour Evaluation Form;

--two response forms developed at the Helen Foresman Spencer Museum of Art, University of Kansas (Laurence, KS) for the use of children who have had a museum lesson;

--"A Guide for the Evaluation of a Docent Tour"-from the Art Museum, University of Texas at Austin;

--forms for evaluation of docent training workshops at the Hirshhorn Museum and Sculpture Garden (Washington, D.C.)

Evaluating Docent Performance

MARY P. FLANDERS, DOCENT TRAINER
OAKLAND MUSEUM
NED A. FLANDERS, EDUCATIONAL RESEARCH

This two-part article is concerned with evaluating museum programs by analyzing tours, teaching evaluation procedures so docents can study their own tours, and using evaluation constructively in the preservice and in-service training of docents. Part I provides a general discussion of evaluation, emphasizing ways to reduce the threat docents may perceive by making evaluation part of a museumwide program. Examples show how tests of knowledge, tour ratings, and the analysis of tour recordings can be combined with the preservice education and in-service training of docents. Part II is much more technical. It shows how interaction analysis is used to analyze segments of a tour recorded in the History Gallery of the Oakland Museum. Emphasis is placed on how a tour is divided into parts, how communication patterns change as a tour progresses, and how docents can analyze voice recordings to study how different tours match the needs of different visitor groups.

Part I—The Problems and Procedures

Should professional or volunteer docents be evaluated? Should their command of specialized knowledge in a chosen subject area be formally tested? Is it possible to evaluate their performance while conducting a tour? Would docents, especially volunteers, resist efforts to evaluate their tour performance? Under what circumstances would a docent perceive evaluation as an eagerly anticipated opportunity to learn, not as a threat or an embarrassment? Would the program of a museum improve as a result of more systematic evaluation? Are there techniques for analyzing the verbal communication during a tour led by a docent? These are some of the questions that guide what is written in this article.

Nearly all human behavior is subject to a continuous informal evaluation. Docent behavior is no exception. In a museum, value judgments are made about the quality of each docent. These values are expressed by the selection process when a docent is invited to help with training others, to help in-service teacher orientation, to guide a special visitor or group of dignitaries, and to act as an official museum representative to other groups. There is no escape from this informal evaluation; note how quickly complaints are expressed about a docent's reliability and punctuality. Informal evaluation is not the topic of this article. The question, "Should professional and volunteer docents be evaluated?" may be more realistically phrased: "Would more formal procedures of evaluating docents provide better information than informal judgments?"

At the Oakland Museum in California, where more than 700 volunteer docents have been trained during the past seven years in the Departments of History, Art, and Natural Sciences, trainees must pass a test in their chosen field and demonstrate their skill by conducting a tour for a member of the curatorial staff at the end of preservice training. Evaluating docent performance at the end of preservice training may be fairly common, but in-service docent evaluation is practically nonexistent. A search of the literature revealed considerable information about training procedures, but no articles on the evaluation of docent programs or docent performance. Oakland docents do have strong opinions on the matter: "You can't evaluate a volunteer docent. She'll quit." "While accepting differences in human behavior and maintaining the individuality of the docent, you *must* evaluate docents." "The effort of the docents deserves evaluation and the reputation of the museum requires it." "Are we afraid of hurting someone's feelings?" "No human being can evaluate another." And, most eloquently, "If we don't begin to evaluate our docents around here our program will go downhill; we need to get the cobwebs and old wives' tales out of our tours."

Evaluating docent performance after preservice training, but not during in-service programs, is really a paradox. An active museum servicing hundreds of visitors per day with trained docents conducting tours is a great place for powerful program evaluation as well as for regularly scheduled, periodic evaluations of docent performance. One can imagine, for example, evaluation projects directed at the museum program itself in which docents are trained to emphasize

Table 1—Evaluation of Docent Program (Evaluations at Arrows)

Docent Training Program	$\xrightarrow{A}$	Matching Tour Performance to Purpose	$\xrightarrow{B}$	Effects of Tours
Course work Gallery instruction Communication skills Simulated tours Analyzing tours or segments of tours		Practice different tours Different tours match different purposes Sequencing exhibits Pacing tours Analyzing visitor participation		Visitor knowledge Visitor attitudes Visitor interests Effects of different tours on different groups

particular objectives by selecting a particular sequence of exhibits, by following a carefully designed tour strategy, and by creating a balance of lecture, questions, and response to visitor ideas such that the tour strategy can succeed. The product of these evaluation projects would be a growing fund of knowledge about how different kinds of tours reach different objectives and, in turn, meet the needs of different visitor groups. As an additional, and welcome, side effect, the evaluation of docent performance would more likely be seen by docents as a program to improve museum services.

It is widely believed that guides and docents should know their subject matter, be able to describe the artifacts and exhibits accurately, and understand the organization of a gallery—that is, the major concepts that permit broader insights and understandings to be learned. Thus, tests are administered to assess the docent's knowledge at the end of preservice training. When a tour is rated by a curator or when the interaction between the docent and the members of the tour group is analyzed, then evaluation includes not only what the docent knows, but also how that knowledge is used in the conduct of a tour. The evaluation is more valid because it goes beyond what is in the docent's head to include the communication skills used. But evaluation of both knowledge and tour performance is directed toward the docent, who is expected to meet a certain standard the way teachers must complete college courses and student teaching satisfactorily before they are awarded a life certificate, pilots must earn their wings, or policemen must win badges and the right to walk a beat. Evaluation of docents can and should have a different focus. Instead of the docent being primarily on the spot, the program should be evaluated, as indicated in Table 1.

In simple terms, evaluation at arrow *A* of Table 1 is concerned with whether the effects of docent training can be seen in tour performance. Evaluation at arrow *B* is concerned with whether tours that have different performance characteristics will, in turn, have different, predictable effects on visitors. The first column refers to docent training activities, the second column refers to different tours and their characteristics, and the third column refers to tour outcomes, the effects on visitors. The arrangement of these columns—indeed, the main thrust of this article—is to show that the evaluation of docents cannot be considered in isolation. The evaluation of docent knowledge and tour performance is best accomplished in the context of program evaluation. To accomplish this evaluation, procedures should become an integral part of docent training as early as possible and be continued as a method of monitoring and improving museum programs.

TOWARD A SYNTHESIS OF EVALUATION AND LEARNING

Under ideal circumstances, learning to become a docent and evaluating tours blend together and cannot be separated. When this occurs successfully, the anxiety typically associated with a test situation is greatly reduced. A volunteer docent, already generously donating time and energy to a museum program, is less likely to resist tests of knowledge and tour evaluation when threat or embarrassment are minimized or not anticipated. The attainment of these desirable conditions is not easily achieved and would depend on following some or all of the following practices during the preservice and in-service training of docents.

Tests of Knowledge and Reaction Sheets—Short quizzes and study questions during preservice training help to emphasize objectives and provide practice in answering questions that might occur on a tour. A final test in one's field of specialized knowledge is much less threatening when the test items or similar test items have already been answered in regularly scheduled quizzes or assignments. Furthermore, it is possible to shift the emphasis from evaluating the docent trainee to evaluating the preservice course itself and those who are the instructors. Two steps help. First, trainees can correct their own quizzes at the end of each study unit, and the test results can be displayed on the blackboard to show the progress of the entire group, but not identify individual scores. Second, at the end of each unit the docent trainer can solicit ratings of the different learning activities with suggestions for improvement. After the results are discussed, it may even be possible to implement the best suggestions in the next unit of study. When this happens, it publicly demonstrates that evaluation is not only a part of learning for both the trainee and trainer, but it is also a method of modifying the training itself. The argument here is that docent tours are evaluated to make changes, changes that lead to improvements. What better way to create this expectation than to have docent trainers publicly evaluate their own training course, their "tours" so to speak, with the view of making improvements?

Behavior as an Object of Inquiry—Reducing threat and possible embarrassment in the evaluation of docent performance on a tour will require new perceptions about one's own behavior, especially its evaluation. Most of us are not accustomed to self-analysis; at best we may be introspective or we may "replay" scenes in our imagination, improving on the original scenario, of course, so we become more poised, witty, forceful, or clever. Such fantasies are not likely to be objective nor lead to constructive change. A good first step is to discover that one's behavior on a tour can be analyzed in terms of purpose without shattering the ego. When the purpose is to establish rapport, is the docent's behavior friendly? When the purpose is to describe exhibits, are the statements accurate? When questions are asked, are they clear? The success of a tour depends not only on the docent's recently learned knowledge, but also on skills of communication, selecting the sequence of exhibits, variation in the pattern of participation, and pacing the tour so that objectives are met in a balanced manner in spite of the limitations of time and the presence of other tour groups in the gallery. The only way a docent can "put it all together" is practice, analyze the performance, and then practice again. Evaluation is necessary for learning; it is more like a lifestyle and less a one-shot affair at the end of preservice training. An essential part of preservice and in-service docent training is to establish curiosity about one's behavior, optimistic expectations about its analysis, and a sense of humor about the learning activities.

Analyzing Communication Skills—The analysis of communication requires procedures that are quite well established; one approach is described in Part II of this article in considerable detail. Fundamental to the entire process of analyzing a tour, or human behavior in general, is the capability of reproducing it in some degree. On a tour, this is best done by making a voice or video-sound recording to be played back under less hectic conditions so that it is possible to stop the action, think about one segment at a time, speculate about what will happen next, and identify patterns. The same idea is present when the golf instructor makes a video recording of a golfer's swing and then separately analyzes stance, addressing the ball, backswing, impact, and followthrough. To establish this basic approach at the earliest possible point in training, the instructors of docents can record and play back segments of their own instruction. In this manner, the instructor's interest in analyzing class interaction during docent training becomes a model of how to improve tours. Later, when a live demonstration tour is first witnessed by trainees, it can also be recorded and time set aside for analyzing at least a part of the recording. In the event that simulated training in communication skills is carried out (for example, practicing how to ask questions about an object on display by interacting with fellow trainees), voice recordings can be made and analyzed on the spot as a part of the learning activity. The thoughtful study of human interaction on a tour takes time, much more time than the original interaction itself. Playbacks can be stopped as often as necessary, patterns can be identified, and speculation about alternatives considered, but only if there is a recording available.

Tour Performance—Tours divide into parts, including orientation, visiting exhibits, discussing objects that lend themselves to particular insights, midtour summaries, and the terminal period in which the entire tour is summarized and questions are posed to stimulate future visits. Because there are divisions, there are often short transition periods between divisions. Given previously recorded tours or segments of tours, docent training can include identifying divisions and transitions between divisions as an exercise in what educators call "discovery learning."

All tours generate what might be called a psychological atmosphere that is greatly influenced by the docent's behavior. This atmosphere can be pleasant and friendly, businesslike, or unpleasant and repressive; in any case, it is created by the participants and it forms a background for the entire tour. Docents need to experiment with different orientation activities during training to discover the potency of "first impressions" and their consequences.

Learning has a logical sequence. Docents need to study how the learning of certain concepts early in a tour may permit more advanced learning at later stages of the tour. They can also learn how a series of simple questions about the features of an artifact can provide the knowledge base required to answer more difficult questions such as where something came from or how an object was used.

All of these observations about docent learning are cited here to illustrate how evaluation blends with learning until the two cannot be separated. To understand the divisions of a tour, how a psychological atmosphere develops, and how learning strategies can be used with particular exhibits is only a first step. The second step of adapting this knowledge to one's own behavior is a kind of learning that requires evaluation.

Evaluating Museum Programs—The main goal of evaluating a museum program is to assess the present relationships between docent education and training, the ability of docents to create tours that match special purposes, and assessing the effects of the tours on visitors—as shown in Table 1. Program evaluation has no end point, and while it may not be continuous, like keeping an accurate count of daily visitors, it is at least periodic.

It has been suggested that an important side effect of program evaluation, as distinct from docent evaluation, is to improve the participation of docents. It is inconsistent, if not unfair, to decide that evaluation will focus on the volunteer docents, while those who train docents and the curatorial staff avoid evaluation. Everyone who works in a museum has a function that can be evaluated, often in terms of effects on visitors. For example, members of the curatorial staff can create two exhibits, then find out which one attracts more attention and why. Docent trainers can teach one unit by one method and another by another and then determine which one seems more effective. Docents can be trained to give two kinds of tours to schoolchildren and then discover which set of outcomes is a better match with the school curriculum. The purpose of assessment in each instance is not to evaluate an individual, but to provide evaluation experiences that benefit individuals. When a group of docents is required or agrees to design and conduct two distinctly different tours, one result will be greater skill for those who participate, most likely through some form of evaluation.

The evaluation of a museum program can include all the evaluation procedures mentioned thus far in this article. Tests of knowledge can be administered to docents, tour performance can be analyzed and given ratings, and data can be collected to determine how different tours affect different types of visitor groups. The threat of evaluation for the individual docent can be reduced when the purpose of evaluation does not focus directly on the docent but instead is concerned with an artifact, exhibit, or gallery objective, when docent tour performance is modified in particular ways to make valid comparisons possible, and when docents understand and accept the plan of evaluation.

EVALUATION AND EXPERIENCED DOCENTS

Evaluation has so far been discussed as if docents became adjusted to it from the very beginning of their education and training. But how can evaluation be introduced to graduate docents who are already conducting tours? Under what circumstances will evaluation procedures be seen by practicing docents as an eagerly anticipated opportunity for new learning? In the field of education, there has been considerable research on the in-service training of teachers. One of the more consistent conclusions is that teachers will modify their teaching behavior when they have the time, incentive, and resources to study it thoughtfully and practice innovations. This generalization does not refer to what might be called a spectator sport—that is, only listening to lectures or only watching demonstrations. Apparently, modifying one's own behavior does require new ideas, insights, or inspiration that may be seen in a demonstration, heard at a lecture, or read in a book, but it also requires personal involvement in analyzing and practicing tour performance. Fortunately, an active museum is an ideal setting for in-service training activities similar to those that have proved successful in education.

Docents learn something from each tour, probably the most from their first few tours. After a year or so, it takes a very unusual tour for significant learning or "unlearning" to take place. The in-service training of docents is justified when this normal learning is accelerated, when insights are gained that cannot be learned from routine experience, or when bad habits are identified and then corrected. No matter how competent a docent may be, improvements are still possible. Like most people, experienced docents do not respond cheerfully to allegations of incompetence, so some care should be given to how in-service training invitations are worded. The best reasons occur when a new exhibit is installed or an existing exhibit modified. However, the need for special tours, the need to modify existing tours, and changes in visitor clientele might be valid reasons for additional docent training. Early in 1976, the Oakland Museum Docent Council passed a resolution requiring the history docents to conduct a demonstration tour for a member of the curatorial staff in 1977, leaving the rest of 1976 for special training to get ready. No matter how programs start, in-service training projects for experienced docents might consider the following suggestions.

Correcting Misstatements—There are at least two sources of misstatements. One is ignorance. Docents do not know what they are talking about so they make up answers, their best guesses, when asked unusual questions. The second is "drifting emphasis," the result of conducting many tours and gradually embellishing explanations to the point of distortion because it is rewarding. Thus, the exploits of a certain person in history, science, or art are exaggerated because this produces attention, laughter, or a change of pace. To find misstatements, a fellow docent can go on the tour or be present when a tour recording is played back. One problem here is that the more carefully a tour is analyzed, the more incorrect statements may be discovered.

Can such an activity provide sufficient reinforcement? There is something phony about a prize for discovering the highest number of mistakes.

Exploiting Particular Objects or Exhibits—An experienced docent can identify particular objects or exhibits in the gallery that become special resources on a tour. It may be comic relief, it may stimulate curiosity, or it may provide unusually good opportunities for visitor participation, but whatever it is, the docent looks forward to reaching that point on a tour. In-service training projects can be built around the sharing of ways that particular objects and exhibits can be used to improve tours.

Using Generalizations—At different points in a tour, summary statements help to cinch what has been learned and to generalize conclusions to situations not shown in a gallery. Extending conclusions from a science, art, or history gallery to the life experiences of a visitor is a very common example. Any conclusion or extended generalization can be stated by the docent as a summary statement, or, exercising some care, adroit questioning can stimulate visitors to "discover" these generalizations. An in-service training program can help docents to recognize both sources of generalizations, to practice using both, and to discover which exhibits lend themselves to one or the other. Docents can identify and practice the particular sequences of questions, based on patterns of thought, that stimulate the discovery of generalizations by visitors.

Learning Communication Patterns—As was mentioned earlier, tours can be divided into parts such as orientation, the first exhibits, midtour summaries, trends shown by a series of exhibits, and terminal activities. An in-service training program can be based on the study of each part with special emphasis on the communication patterns most appropriate to each part. Is it wise to start a tour with a series of rhetorical questions or is it advantageous to outline the tour with a series of overview statements? How are midtour summaries best made? These questions, and many others, can guide the in-service training of experienced docents.

Matching Tours to the Needs of Visitor Groups—Because exhibits can be arranged into different sequences, the pace of a tour can be varied. Different mixtures of docent lectures, questions, and reactions to visitor statements are possible; there is an infinite number of tour possibilities. Docents can learn to solicit and identify the interests of a particular tour group and adapt the tour accordingly. Practicing these adaptations is rewarding during the in-service training of experienced docents. This kind of training might be called "spontaneous curriculum innovation" within a gallery that has more alternatives than can be realized in a single tour.

Special Entrance and Exit Activities—In a few museums, special rooms are provided for creating readiness before a tour begins and for reconstructing tour experiences after the group exits from the gallery. For example, even when a "mobile exhibit" visits schools before the schoolchildren visit a museum, and even when classroom teachers are given instructions about how to help pupils anticipate their visit, there still may be some benefit from holding an orientation briefing in a special room before a tour starts. Similarly, after a tour is completed, debriefing the tour group may assist schoolteachers who wish to conduct followthrough activities after a museum visit. An in-service training program can experiment with these activities before and after a visit to a gallery, and the activities can be adopted when the experimental trials look promising.

SUMMARY

It can be argued that evaluating docents does more harm than good. One reason may include the view of some existentialist writers who believe that certain features of human behavior are so artistic, spontaneous, and creative that analysis is impossible—what you seek is destroyed by the process of looking for it. For example, a particularly popular and charismatic docent may perform like a dud when observers gather around to analyze the process. A second reason may be that docents flourish best when they are left alone. This argument suggests that docents are less effective when they know their performance will be evaluated. A contrary view is that "people move toward excellence as they clarify their purposes, measure the impact of their action, and evaluate their progress" (Glass, 1975). Still another view was put by one Oakland docent: "I am practicing to see if I can move toward my goal of getting my facts straight, setting a friendlier atmosphere, getting away from straight lecturing so that I can draw out the ideas of the schoolchildren on my tour and to see if I can ask the sorts of questions that pique curiosity and stimulate creative responses." These three points of view and others that could be mentioned illustrate conflicts that must be resolved by those who decide whether docents should be evaluated, how this is best accomplished, and when it should be scheduled.

This leads us to the question of how to decide whether or not to evaluate docents. We recommend it, keeping in mind the cautions and qualifications mentioned. The final answer for a particular museum will always remain incomplete until adequate evidence has been gathered. Gathering and interpreting this evidence is itself a form of evaluation.

Part II—Applying Interaction Analysis to a Single Tour

Interaction analysis (IA) is a system of making code marks to classify statements when people talk, arranging these code marks into a display as in a table or graph, and then interpreting the displays to reach conclusions about what was said. The coding procedures can be used when listening to a voice recording, watching a videotape, or observing a live tour. Like any kind of shorthand notation, the procedures require several hours of practice at the beginning; speed and accuracy continue to increase during the first ten to fifteen hours of use. Once learned, docents can use the technique to describe particular patterns of tour interaction in great detail, try them in a practice tour, make a recording, and analyze the playback. The combination of making a plan, trying it out, and then analyzing what happened provides a powerful method of training, one that seems particularly suitable for docents.

IA is the product of research on teaching and has been successfully adapted to teacher education in more than half of the institutions that train teachers in the United States. There is much more to read about IA than can be written in this article. Readers who are seriously interested in adapting IA to the analysis of museum tours and to docent training and education can make use of the annotated bibliography at the end of this article.

When IA is used in the preservice and in-service training of docents, the following steps are recommended. To begin, docents will need to practice coding. A good way to start is to code previously recorded museum tours. If these recordings are carefully selected, the trainee can be exposed to the performances of unusually gifted docents at the same time. Next, docents can plan short segments of a longer tour. They might plan how they would introduce themselves when they first contact a tour group or how they would make use of a particular object from a display, but whatever is chosen, the tour segment should last less than ten minutes and be planned so that fellow trainees can simulate the participation of the tour group. With simulation, one does not have to wait for a regular tour; the cycle of plan, record, and analyze can be completed in about a half hour. A third step involves the analysis of a complete tour, con-

Table 2—Flanders Interaction Analysis Categories (FIAC)

Docent talk	Response	1. Accepts feelings or attitudes
		2. Praises or encourages
		3. Accepts or uses ideas of visitors, including questions based on visitor ideas
		4. Asks questions based on docent ideas
	Initiation	5. Lectures and gives information
		6. Gives directions
		7. Criticizes and corrects behavior
Visitor talk	Response	8. Talks in response, gives expected answer
	Initiation	9. Initiates talk, expresses own opinion
None of the above		10. Silence or confusion

NOTE: Arabic numbers indicate categories, not scaled judgments.

ducted under standard conditions, with regular museum visitors. IA is used to analyze a tour in terms of purposes. Because purposes change as a tour progresses, one would expect corresponding changes in the tour interaction. For example, the purpose of the first part of a tour may be to orient visitors to the gallery and establish rapport, quite different from clarifying the transition between one set of exhibits and another. We can use IA to demonstrate that two purposes produce two different communication patterns. But even more important, the communication patterns that occur can be compared with what was intended—with a preferred strategy or model.

CATEGORIES AND CODING COVENTIONS

Table 2 shows a ten-category system that has been widely used in the United States. Notice that the left column indicates docent talk, visitor talk, and none of the above. Docent and visitor talk are both divided into statements of response and initiation. Seven categories are assigned to docent talk, two to visitor talk, and one to silence or confusion. These three conditions—docent talk, visitor talk, and silence or confusion—are said to be totally inclusive of all possibilities. That is, a code mark can always be made in one of these three conditions. This makes it possible to jot down code marks at a constant rate, about one mark every three seconds. Only the numbers are recorded, so one would jot down about twenty 5's if a docent happened to lecture for one minute. A 4 indicates a question based on the docent's ideas, and an 8 is used when a visitor gives a short expected response. Several hours of training will permit the average docent to code tour communication smoothly and with confidence, at rates fast enough to keep up with the talk, but the first hour of practice can be somewhat frustrating.

The ten categories should be used by docents during their first attempts to practice coding. But the proper conduct of a tour and some of the strategies docents will learn require more detail than the ten categories provide. More information about docent questions (category 4), responsive statements (category 3), and different kinds of visitor statements (categories 8 and 9) would be helpful. Letter

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Episode 1—A fourth-grade tour group is at the California Indian exhibit looking at four pictures on the wall showing different kinds of boats and tattooed faces.

Speaker	Statement	Code Mark
Docent	"Now look at the boats in those four pictures.	6A
	Do you see any differences between their boats?"	4B
Several visitors	"It's a tule boat.	8A
	Yeah, we studied those kinds. We studied tule boats."	9A
Docent	"What's a tule boat?"	3A?*
Visitor	"It's made out of tulies."	8A
Docent	"What are tulies?"	3A?*
Visitor	"They're like real long pieces of grass."	8A
Docent	"Right. They are tule reeds, we call them, reeds	5A
	that grow in the water. And they make wonderful	5A
	boats, just like in that picture. Now this boat is different."	5B
Several visitors	"It's a . . . ah . . . it's a canoe. Yeah, a canoe."	9A
Docent	"So what do you figure about that boat?"	4**
Visitor	"It's made of wood."	9B
Docent	"Maybe they didn't have tulies, right?"	5B
Visitor	"They'd have wood. They used wood or bark."	9A
Docent	"They used something different.	5B
	People tend to use what they have handy, don't they?"	5C

*The word *tule* was introduced by a visitor. To ask a question about a visitor idea is category 3, not 4.

**This is a vague question, possibly due to the confusion of too many speakers. The docent was attempting to guide the group toward comparisons and could have asked, "Are the boats (canoes) made of different materials?" But the next visitor to speak caught the main thrust of the discussion.

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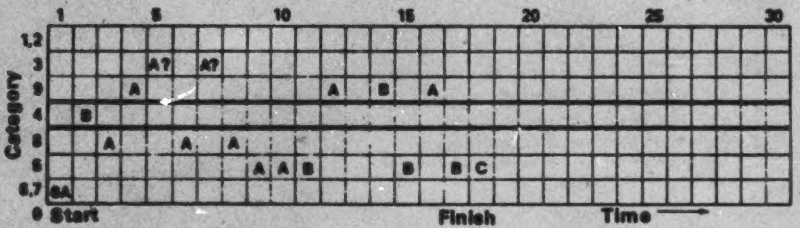
symbols in combination with the arabic numbers can be used to divide some of the categories. In this article, the letter *A* designates a fact about or an attribute of an artifact or exhibit, *B* designates a grouping of facts or comparisons of groups of facts, and *C* designates summaries, conclusions, or generalizations. If the coder cannot determine which letter should be used, the letter is simply omitted. These letter subdivisions are easier to use with recordings than with live tours because the playback can be stopped when the coder cannot keep up; using letters usually slows the rate of coding.

Episode 1, from a recording of a tour for fourth-grade students in the History Gallery of the Oakland Museum, illustrates coding with both numbers and letters. The exchange alternated between the docent and the visitors. The docent did not lecture; she guided the discussion by asking questions. At the end of the short exchange, less than one minute, it was concluded that Indians used different materials to make boats and that they tended to use materials close at hand. Interaction of this kind can be recorded directly into a display called a *timeline*, shown in Figure 1.

The timeline is marked from left to right, one mark to each column. It is arranged so that visitor initiations and docent responses appear in the top three rows, and docent initiations and visitor responses appear in the bottom four rows. In Episode 1, visitor initiation occurs primarily in the last third of the episode (see row 9). The progression of facts (letter *A*) to comparisons (letter *B*) to conclusions (letter *C*) can easily be seen. As a single row the sequence is *A B A A A A A A A A B A B B A B C*. A display of this sort provides two kinds of information at a glance: first, the incidence of marks in the bottom four rows versus the top three rows shows the relative emphasis of docent- versus visitor-initiated ideas; second, the pattern of letters from left to right helps to trace the level of thinking as it moves from facts to more abstract relationships. Note that the docent, not a visitor, stated the conclusion.



1 *Timeline of Episode 1*

Episode 2 is from the same recording. In this sequence a conclusion is "discovered" by a fourth-grade student. We ask you, the reader, to study the dialogue and code marks seeking answers to the following questions: Where are the generalizations and conclusions? How would you describe the dialogue prior to the first conclusion? If a tour objective is to have a visitor state a conclusion or generalization, how does the pattern of interaction before the first conclusion help? Although it is not shown in the printed version, the youngsters became increasingly excited and eager to participate. The last student statement—starting with "I know!"—just burst out with irrepressible energy. How would you explain this growing excitement? It may be helpful to study the timeline in Figure 2. Avoid reading the next paragraph until you have completed your tentative answers.

Particular question sequences that facilitate the discovery of a conclusion, explanation, or generalization have been described by Taba (1965) and Morine and Morine (1973). One sequence starts with a

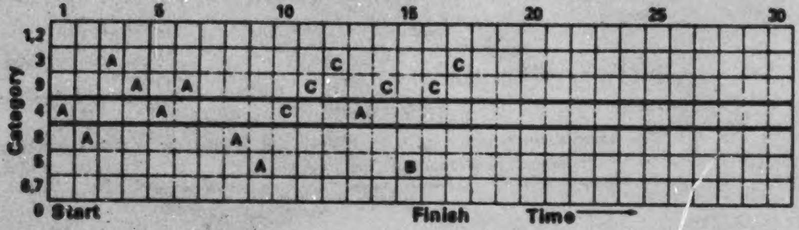
Episode 2

Speaker	Statement	Code Mark
Docent	"While you were studying about Indians did you study anything about what they eat?"	4A
Visitor	"They eat acorns, seeds, corn meal . . ."	8A
Docent	(Repeating answers) "acorns, seeds, corn meal?"	3A
Visitor	"They also ate deer, rabbits, and lots of things."	9A
Docent	"Um hm. Have you ever wondered where they stored these acorns?"	4A
Visitor	"They put them in there . . ." (pointing to the granery)	9A
Docent	"Do you know what the name of that thing is?"	4A
Several visitors	"Is it a tent? Maybe it's a shed"	8A
Docent	"They called it their acorn granery. Why do you suppose it is up off the ground? Why would they do that?"	5A 4C
Several visitors	"Because of rats and mice and . . ." (several voices)	9C
Docent	"It did keep out smaller animals. Do you notice the straw roof like a raincoat over it?"	3C 4A*
Visitor	"It keeps out the rain. So the rain won't get in."	9C
Docent	"It has the effect of an umbrella or raincoat. The water runs off."	5B
Visitor	"I know! That's so the acorns won't rot!"	9C
Docent	"Right. They wouldn't rot if they didn't get wet."	3C

*The descriptive metaphor *raincoat* is quite graphic and helps to focus thought in the direction of the second generalization that follows.

series of narrow questions about the facts and features of an artifact. Or the docent can ask questions that require the visitor to group certain features and then compare one group with another. The third type of question literally asks for explanations or conclusions. Apparently, the mistake made most often by teachers and docents is spending too little time on the first two types of question. By asking visitors to identify features and facts, even repeating some questions, a higher proportion of the tour group participates in constructing an information base—a mass of information that is critical to the formulation of a conclusion or generalization. Episode 2 does not really show all of these steps, but it is an approximation, however short, of the questioning strategy recommended by Taba and the Morines.

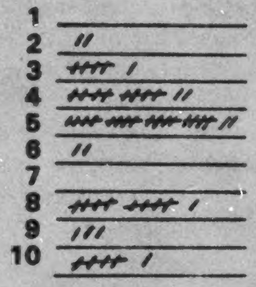
The docent in Episode 2 had the advantage of children whose teacher had prepared them for the visit; they had discussed acorns and even ground them to make meal. Nevertheless, it was the sequence of questions asked by the docent that led to the conclusions that a granery was built off the ground and had a roof to protect the acorns from animals and to reduce rot due to dampness. It can be argued that visitors should be encouraged to observe the attributes of an object carefully, to speculate on why these features are present, and to propose explanations about why it was designed in some particular way, how it was used, and what functions it may have provided. In fact, this kind of active participation may explain the excitement that sometimes develops in a tour of schoolchildren; it not only involves them, it also challenges them to think. Given these objectives, we must then consider how docents can best acquire the skills necessary to create such opportunities. The best answer so far available from research in the social sciences is to provide docents with the opportunity to study their own interaction thoughtfully and carefully, then let them practice different interaction patterns, followed by further study. In this process, the time required to learn IA pays off by a faster and more penetrating analysis of the docent's own interaction.



2 *Timeline of Episode 2*

Timelines and Other Displays—The effectiveness of IA as a training procedure depends on using a display that can be constructed easily and read quickly. The timelines in Figures 1 and 2 are simply marked with a pencil on a blank form as the docent listens to a recording of a tour or tour segment. As each mark is made, the display is completed; thus, the display is ready to read the instant the coding stops. But a single page of blank timelines (8½ × 11 inches) represents about six minutes, and therefore the timeline is most useful for coding short practice sessions or parts of a tour lasting less than twenty minutes. A timeline has the advantage of showing the original sequence, one code mark after another.

Another form of IA display is a simple bar graph on lined paper. The category numbers 1-10 are written from top to bottom, and individual tallies are marked at about the same rate of one every three seconds. The marks, made one at a time, fail to show the original sequence of events, but more than one hour of interaction can be recorded on a page. A partial example is shown. Using groups of five makes counting faster when interpreting the display. To subdivide categories, rows are added for 3A, 3B, etc. This bar graph display is most useful when tours up to ninety minutes are to be coded and when attention to short segments of interaction is not necessary.



PATTERNS OF INTERACTION

The person who constructs a display will spend several hours learning how to code, and we must ask whether the time and energy are well spent. One answer is that the act of coding is essentially one of discriminating among different statements. Knowing them and being able to recognize them in the context of interaction may well be the first step in learning to design and perform tour strategies. A second desirable outcome of learning IA is overcoming the natural reticence that inhibits the study of one's own behavior. In order to learn IA one must practice, and the most convenient specimen of behavior is often a recording of one's own tour. Finally, IA can be recommended because it focuses attention on critical interactions—exchanges that are most likely to determine the success or failure of a tour. Several critical interactions are discussed below.

Docent Questions—A docent question and visitor answer producing a 4-to-8 sequence of code marks (see Table 2) will probably be quite different from a 4-to-9 sequence. A 4-to-8 sequence is likely to be a "what, where, when" question to which there is a right or wrong answer. A 4-to-9 sequence is likely to be a question soliciting opinion, personal experience, or judgment based on more complex thought processes. Knowing the consequences of using these different types of questions on a tour may very well be critical.

Responding to Visitor Statements—The first words spoken by a docent when a visitor stops talking have a special impact. At this instant the visitors obtain clues about whether their statements were right/wrong, acceptable/unacceptable, funny/not funny, or any other judgment a docent may wish to make. The exchanges can determine the success or failure of a tour because both emotional rapport and cognitive development depend on them. The docent's use of approval and encouragement clearly influences rapport, and how the docent makes use of visitor ideas (category 3) influences the development of concepts and how these concepts are used to solve problems. Both are critical to reaching the objectives of the tour. In terms of IA, docent responsiveness is expressed by sequences of category numbers such as 8-to-2, 8-to-3, 9-to-2, and 9-to-3. The use of praise to encourage and the use of visitor ideas to guide thinking are coded in these sequences.

Level of Thinking—The three subdivisions of docent and visitor talk—*A* for facts and attributes of artifacts, *B* for grouping attributes and making comparisons, *C* for conclusions, explanations, and generalizations—can be used to trace the level of thinking of the tour interaction. The understanding of a gallery, exhibit, or artifact can be described as a special case of teaching and learning particular concepts. Although we still need to know much more about how people learn concepts, we do know that concepts are hierarchic in the sense that understanding more complex concepts depends on first learning slightly less complex ones. Given the hierarchic nature of concepts, efficient learning obviously will depend on which concepts are introduced first, which second, etc. The category subdivisions *A*, *B*, and *C* are primitive distinctions about the complexity of concepts and thereby become tools for tracing this aspect of tour performance.

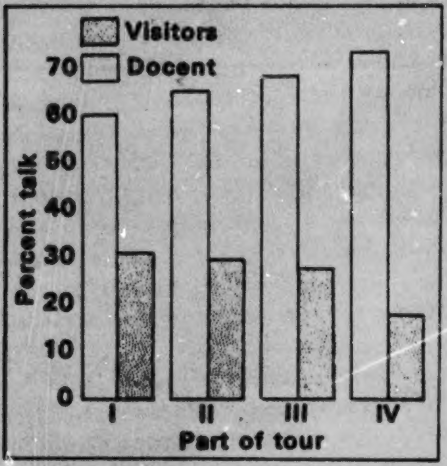
Research on teaching provides us with the evidence to nominate the foregoing three interaction patterns as critical to the conduct of a museum tour. But research is not yet sufficiently advanced to provide any evidence as to what makes a tour effective. It does seem reasonable to suppose that questioning, responsiveness, and control of concepts are features of a tour likely to affect the outcome. IA becomes a tool to explore these issues further.

EVALUATING A SINGLE TOUR

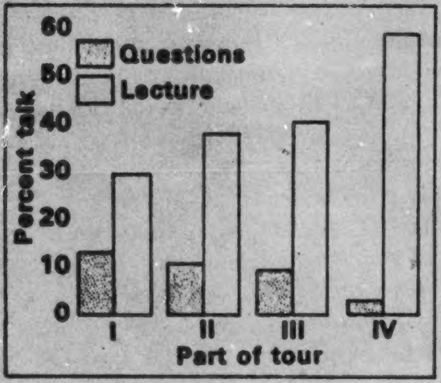
In summarizing a single tour, we hope to show that interaction patterns vary from one phase of a tour to another, that these variations are controlled by the docent, and that the docent decides what variations are going to occur in terms of immediate purpose. It would then follow that a tour would improve if the primary purpose of each phase of the tour were carefully clarified by the docent, if the docent knew which interaction patterns were most likely to help satisfy that purpose, and if the docent had the skills necessary to create the desired interaction patterns. Unfortunately, analysis of one tour cannot support this entire rationale for the improvement of a tour, but it can show that interaction patterns change during a tour, and the changes appear to be associated with the docent's behavior.

Description of Tour—The tour is the same as the one from which the two episodes were taken. Eight students in the fourth grade visited the History Gallery as part of a unit on California history; thus, they had studied the topic before coming to the museum. The docent had completed two years of training and was experienced in conducting tours.

The tour was fifty-seven minutes long and in this analysis is divided into four parts. Part I was the first seven minutes, with special emphasis on establishing rapport and setting expectations about visitor participation. Part II moved into a work phase, still in the Indian exhibits, where the docent tried to guide the visitors toward insights about Indian life-style and culture. Both episodes shown earlier were



3 *Docent and visitor talk*



4 *Docent lecture and questions*

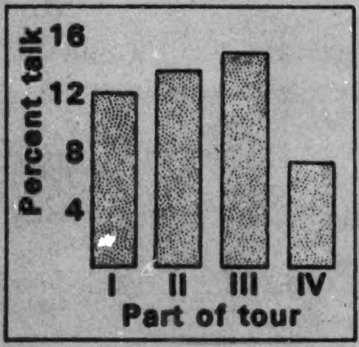
from Part II, which was about eleven minutes long. Part III was a twelve-minute period in which the eagerness and excitement of the visitors started to get out of hand. Some students were not paying attention to objects selected by the docent, were talking among themselves, and were gradually upsetting the docent, who felt that control of the tour was eroding. Part IV was the last twenty-seven minutes of the tour during which the docent decided to lecture more and solicit visitor reactions less frequently. In other words, the docent responded to the students' behavior by emphasizing subject matter.

Distribution of Talk—A most elementary analysis is to divide the talking time of a tour between the docent and the visitors. Figure 3 shows that docent talk was about sixty percent in Part I, seventy-three percent in Part IV, and at intermediate levels in Parts II and III. Naturally, visitor talk decreased in a corresponding manner.

Figure 4 shows the percent of total tour time the docent spent lecturing and asking questions based on the topics selected by the docent. In both kinds of statements, the docent talked, using questions and lecture to guide the discussion. The graph shows an increase in docent lecture and a decrease in docent questions.

Combining the results of Figures 3 and 4, it is clear that the pattern of interaction changes when one part of the tour is compared to another. These changes are reasonable—the docent is likely to ask more questions and lecture less in Part I, presuming there is an emphasis on establishing rapport. These questions encourage visitor talk, which was also highest in Part I.

It appears that the docent remained responsive to visitor ideas far longer than the seven minutes of Part I. The docent's response to the ideas suggested by the students (category 3) is shown for all parts of the tour in Figure 5. The twelve to fifteen percent in Parts I-III is



5 *Docent response—category 3*

well above average for fourth-grade classroom teachers. A substantial drop occurred in Part IV, when the docent wanted to decrease visitor initiations.

Matrix Displays and Interpretations—The most powerful display of IA data is the matrix. It is powerful because it converts the ten-category system into the equivalent of 100 categories by taking code marks two at a time or as pairs recorded in their original sequence. An illustration will help. Suppose a docent lectures for about nine seconds, asks a short question, and a visitor's answer lasts about six seconds. The code marks would be 5, 5, 5, 4, 8, 8. This sequence of six code marks can be tabulated into a matrix as five pairs: first 5-5, second 5-5, third 5-4, fourth 4-8, and fifth 8-8. These paired numbers serve as an "address" within the matrix; the first number designates the row and the second designates the column. Thus, the two 5-5 pairs are added to the cell at row 5, column 5, and each pair, in turn, is added to its proper cell. After all these pairs are counted, the number in a cell is equal to the number of times that pair occurred.

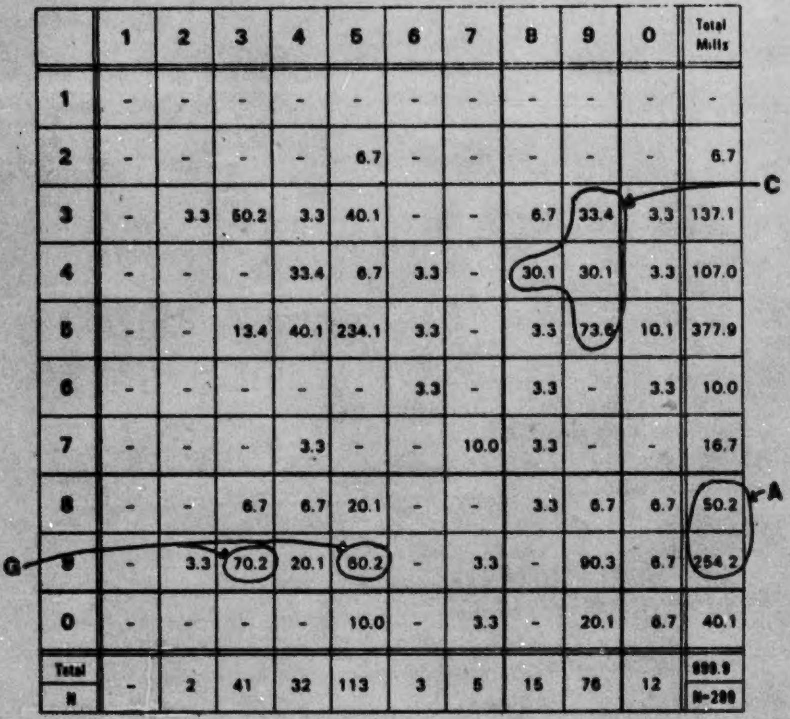
Once the pairs are tabulated into a matrix, interpretation of the matrix can begin. But the first problem is that one matrix may represent a part of a tour that was twice as long as a second matrix representing a shorter period. In this case, the fifty-seven-minute tour was coded by 1628 code marks: 209 for Part I, 299 for Part II, 344 for Part III, and 776 for Part IV. When the total tallies for a matrix are so different in magnitude, cell frequencies cannot be compared directly. Just as we found it convenient to convert raw frequencies into percent in constructing the graphs discussed earlier, it is customary to convert a matrix into the common base of 1000 code marks. *Cent,* of course, means one one-hundredth in *percentage,* and *mill* means one one-thousandth in *permillage.* Figures 6–9 are "millage

	1	2	3	4	5	6	7	8	9	0	Total Mills
1	-	-	-	-	-	-	-	-	-	-	-
2	-	-	4.8	-	14.4	4.8	-	-	9.6	4.8	38.3
3	-	9.6	19.1	9.6	23.9	-	-	-	57.4	-	119.6
4	-	-	-	28.7	9.6	-	-	71.8	19.1	-	129.2
5	-	4.8	4.8	38.3	201.0	9.6	-	-	28.7	4.8	296.7
6	-	-	-	9.6	-	-	-	-	4.8	4.8	19.1
7	-	-	-	-	-	-	-	-	-	-	-
8	-	14.4	14.4	9.6	19.1	-	-	23.9	14.3	4.8	100.5
9	-	9.6	76.6	14.3	23.9	4.8	-	-	81.3	9.6	220.1
0	-	-	-	14.3	4.8	-	-	4.8	4.8	47.8	76.6
Total N	-	8	25	27	62	4	-	21	46	16	1000.1 N=209

6 *Matrix display, Part I*

matrices" and correspond to respective parts of the tour. The total mills per category are shown in the right-hand column, and the raw tallies on which these figures are based are in the bottom row. Out of the 111 different bits of information in a single matrix, the discussion that follows uses only those numbers identified by arrows.

We begin by comparing the total mills for category 9 (visitor-initiated talk) and category 8 (visitor-response talk) for each of the four matrices. Each pair of figures is identified by an arrow *A*. Note that the category 9 number is always at least twice as large as category 8. Why would a tour group show this much initiative? One answer is that this is a special tour group, perhaps as a result of their personalities or their active study of California Indians just before the tour. Unfortunately, we cannot test this explanation with the data from a single tour. But even though limited to a single tour, we do have many examples of visitor initiation and response statements, and we may be able to associate these with docent statements. Our



	1	2	3	4	5	6	7	8	9	0	Total Mills
1	-	-	-	-	-	-	-	-	-	-	-
2	-	-	-	-	6.7	-	-	-	-	-	6.7
3	-	3.3	50.2	3.3	40.1	-	-	6.7	33.4	3.3	137.1
4	-	-	-	33.4	6.7	3.3	-	30.1	30.1	3.3	107.0
5	-	-	13.4	40.1	234.1	3.3	-	3.3	73.6	10.1	377.9
6	-	-	-	-	-	3.3	-	3.3	-	3.3	10.0
7	-	-	-	3.3	-	-	10.0	3.3	-	-	16.7
8	-	-	6.7	6.7	20.1	-	-	3.3	6.7	6.7	50.2
9	-	3.3	70.2	20.1	60.2	-	3.3	-	90.3	6.7	254.2
0	-	-	-	-	10.0	-	3.3	-	20.1	6.7	40.1
Total N	-	2	41	32	113	3	5	15	76	12	999.9 N=299

7 Matrix display, Part II

job, then, is to construct a tentative explanation of how visitor initiation was influenced by the docent.

First, what was the docent saying just before a visitor began to talk? In a matrix, we look at cells in which the first number varies from 1 to 7 (docent talk) and the second number is either 8 or 9 (visitor talk). Arrow *B* in Figure 6 indicates that the docent was asking a factual question most often (71.8 in the 4-8 cell) or responding to visitor ideas (57.4 in the 3-9 cell). Thus, for the initial seven minutes in Part I, the docent was asking specific questions or was commenting on an idea suggested earlier by a visitor most often just before a visitor began to talk.

Four cells are circled for arrow *C* in Figure 7, indicating a change in how the docent stimulated visitor participation. She was now most likely to stop lecturing just before a visitor expressed an idea (see the 5-9 cell, arrow *C*), a trend that continued for the rest of the tour (see the 5-9 cell, arrows *D* and *E*). In three other cells (4-8, 4-9, and 3-9),

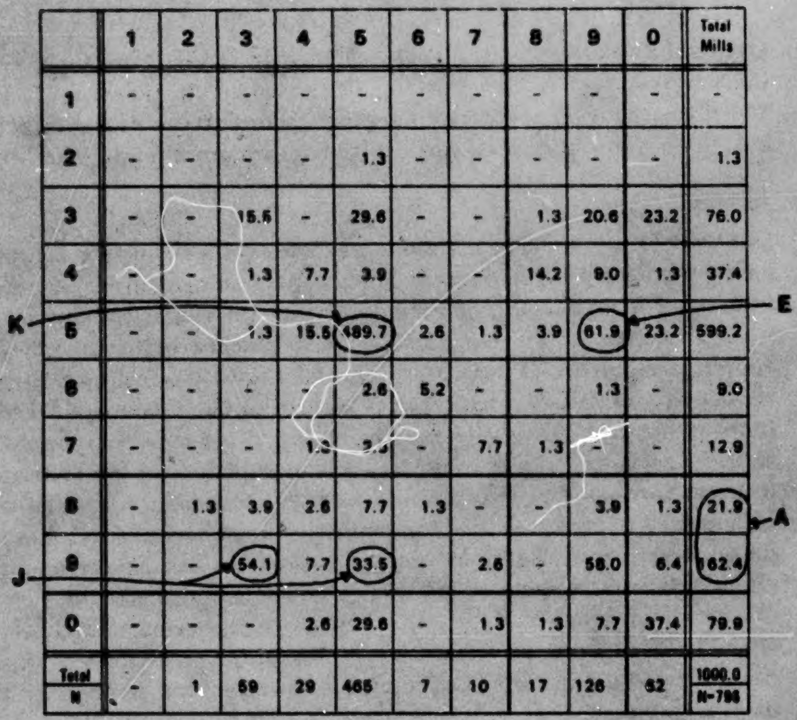
		1	2	3	4	5	6	7	8	9	0	Total Mills	
	1	-	-	-	-	-	-	-	-	-	-	-	
	2	-	-	8.7	-	2.9	-	-	-	-	-	11.6	
	3	-	-	43.6	11.6	26.2	2.9	-	8.7	34.9	17.4	145.3	
	4	-	-	-	37.8	2.9	-	-	43.6	8.7	5.8	98.8	D
	5	-	-	2.9	37.8	282.0	-	-	5.8	72.7	5.8	407.0	
	6	-	-	-	-	-	2.9	-	-	2.9	-	5.8	
	7	-	-	-	-	2.9	-	2.9	-	-	-	5.8	
	8	-	5.8	14.5	2.9	32.0	-	-	5.8	2.9	-	64.0	A
H	9	-	5.8	72.7	8.7	34.9	-	2.9	-	78.5	5.8	209.3	
	0	-	-	2.9	-	23.3	-	-	-	8.7	17.4	52.3	
	Total N	-	4	50	34	140	2	2	22	72	18	999.9 N=344	

8 *Matrix display, Part III*

frequencies in the thirties (30.1 to 33.4) indicate a wider range of docent questions and responses. Narrow and open questions (4-8 and 4-9), for example, have an equal incidence.

A picture now begins to emerge to show what was happening just before a visitor began to talk. In Part I the docent asked a specific question or completed a response to a visitor's idea. In Part II, a wider range of docent questions appeared, perhaps to help students interpret the exhibits. This led to a new pattern in which visitors expressed their own ideas as a reaction to a pause in docent lecturing. These more independent 5-9 transitions, like an adult debate, predominated for the rest of the tour.

What did the docent choose to say at the moment a visitor stopped talking? For this information, we study the cells in rows 8 and 9, columns 1 through 7, in which transitions from visitor to docent talk are tabulated. In Part I, the docent's initial reaction was to respond to the ideas expressed by students, shown by arrow *F*. In Part II, the



	1	2	3	4	5	6	7	8	9	0	Total Mills
1	-	-	-	-	-	-	-	-	-	-	-
2	-	-	-	-	1.3	-	-	-	-	-	1.3
3	-	-	15.6	-	29.6	-	-	1.3	20.6	23.2	76.0
4	-	-	1.3	7.7	3.9	-	-	14.2	9.0	1.3	37.4
5	-	-	1.3	15.6	489.7	2.6	1.3	3.9	61.9	23.2	599.2
6	-	-	-	-	2.6	5.2	-	-	1.3	-	9.0
7	-	-	-	1.3	2.6	-	7.7	1.3	-	-	12.9
8	-	1.3	3.9	2.6	7.7	1.3	-	-	3.9	1.3	21.9
9	-	-	54.1	7.7	33.5	-	2.6	-	58.0	6.4	162.4
0	-	-	-	2.6	29.6	-	1.3	1.3	7.7	37.4	79.9
Total N	-	1	59	29	465	7	10	17	126	62	1000.0 N-798

9 *Matrix display, Part IV*

docent continued to respond to student ideas, but more often introduced new subject matter through lecture (the 9-5 cell, arrow *G*) less related to what a student just said. In Parts III and IV, essentially the same pattern is shown by arrows *H* and *J*. In Part IV, sustained lecturing (arrow *K*) reached the level of 489.7 mills (about forty-nine percent) during the last twenty-seven minutes of the tour.

Given these data, what explanations best account for the high proportion of initiation shown by the statements of this tour group? First, the docent carefully nurtured participation and rapport by her questions and responsiveness in Part I. In Part II, the same responsive style that promoted rapport in Part I was transferred to guiding the students' understanding of the exhibits until a fairly independent give and take emerged in which the docent introduced information about the exhibits and the visitors then expressed their own ideas. Apparently, the excitement created by this relatively responsive tour environment "got out of hand," to use the docent's expression, and she proceeded to cool down the overheated interaction. Simple praise and reinforcement practically disappeared in Part IV. Docent questions were reduced, and lecturing increased, in turn reducing the verbal participation of the visitors. But even though the visitors talked less, the high proportion of student initiation was not diminished.

SUMMARY

In Part II of this article various procedures for analyzing a tour have been described. A timeline display is recommended for docent training; it is particularly appropriate to the analysis of communication skills that can be recognized by their timeline patterns as they appear in segments of simulated or regular tour interaction lasting about ten minutes. The ten-category system can be subdivided when timeline displays are used by placing letters in the cells. Graphs and matrices are a method of summarizing longer periods of interaction. It seems obvious that interaction data from tours can be associated with various outcomes. For example, visitors can be asked to fill out rating forms, recorded tours can be isolated to learn more about visitor satisfaction, tests of knowledge can be administered to identify tours on which visitors learned more or less information, and interactions in front of different exhibits can be compared. In this manner, evaluation produces useful knowledge for improving a museum program.

There are many ways to change a museum program: obtaining new artifacts, building new exhibits, training docents, organizing a variety of tours, and experimenting with different kinds of tours for various visitor groups. Evaluation is necessary to determine the consequences of these changes. A *continuing* program of evaluation, as distinct from *occasional*, is necessary to decide whether changes are or are not improvements. Occasional evaluation will help a docent understand how establishing rapport at the beginning of a tour involves interaction patterns quite different from the summary at the end of a tour, the difference between covering many exhibits superficially versus a few in depth, or different tour strategies. But to decide whether a change in a museum program is or is not an improvement cannot ordinarily be determined by occasional evaluation. A continuing evaluation of museum programs takes into consideration different types of visitors, provides baseline data for evaluating exhibit changes, and gradually develops a knowledge base over longer time intervals. Identifying an improvement is more likely to be valid when objective information is available, thoughtfully collected over an adequate period of time.

In Parts I and II of this article, special emphasis has been given to the evaluation of docent performance, education, and training. Questions such as these have been discussed: Can we detect patterns of interaction when docents emphasize facts? When artifacts are compared? When concepts underlying exhibits are identified? When generalizations are made? Is the participation of visitors influenced when docents are more responsive? Do interaction patterns change from one part of a tour to another? There are procedures for analyzing verbal interaction on a tour. In a program of evaluation, IA data can be compared with visitor attitudes and knowledge before a tour, immediately after it, and several weeks after the museum visit. Part I has suggested that the methods of docent training, both preservice and in-service, can provide the foundation for a continuing program of evaluation. Part II has illustrated how verbal communication can be analyzed.

It is the docent, professional or volunteer, who meets the public, conducts the tours, and creates an active learning opportunity from the quiescent artifacts thoughtfully organized by curators into exhibits. Both parts of this article are concerned with helping the docent make the most effective use of specialized knowledge and communication skills. Perhaps we have been discussing the right of a docent to learn in a museum environment, to escape from the routine of a rigid, invariable tour performance, and to share in the excitement of discovering innovations.

ACKNOWLEDGMENT

We are indebted to David Estabrook of the Smithsonian Institution, who may have been one of the first (1973) to analyze the recording of a tour using the ten-category Flanders system.

REFERENCES

Flanders, N. A., *Analyzing Teaching Behavior.* Reading, MA: Addison-Wesley, 1970. Describes the procedures and limitations of interaction analysis as applied to teaching. Would be particularly useful for docent trainers because it includes procedures for practice, for adapting categories to special purposes, and for multiple coding of single events.

——— "Basic Teaching Skills Derived from a Model of Speaking and Listening," *Journal of Teacher Education*, vol. 24, 1973, pp. 24-37. Discusses important transitions in verbal communication with direct application to docent training and evaluation. Less concerned with observation procedures than with the theory of verbal interchange that could serve as an approach to analyzing tour recordings.

——— et al., *Interaction Analysis: A Minicourse.* St. Paul, MN: Paul S. Amidon & Associates, 1974. Package contains training manuals, cassette tape recordings, and observation forms designed for in-service training of teachers, but could be adapted for docents. Descriptive flyer is available from the publisher (1966 Benson Avenue, St. Paul, MN 55116).

Glass, G. V., "A Paradox About Excellence of Schools and the People in Them," *Educational Researcher*, vol. 4, no. 3, March 1975, pp. 9-13.

Morine, H., and Greta Morine, *Discovery: A Challenge to Teachers*. Englewood Cliffs: Prentice-Hall, 1973. Details various deductive and inductive discovery lessons, including exercises for concept attainment and development with direct application to questioning strategies in docent tours. These strategies would lend themselves to developing special categories for analyzing tour voice recordings in terms of concept attainment.

Taba, H., "The Teaching of Thinking," *Elementary English*, vol. 42, no. 5, May 1965, pp. 534-541. Discusses instructional strategies for teachers that could be adapted to museums.

In 1976 the active and enterprising Docent Council of the Oakland Museum surveyed other docent councils in the Western United States to learn their evaluation practices. We reprint the summary of responses and the current (February 78) evaluation sheet that the Oakland Council sent to respondents.

DOCENT COUNCIL
Oakland Museum Association
1000 Oak Street
Oakland, California 94607
Telephone: 415/273-3515 or 893-0340

February 23, 1978

Oakland Museum Docent Council
Docent Tour Evaluation
Progress Report

Dear Docent Council Chairperson,

In 1976, the Oakland Museum Docent Council sent you a Docent Tour Evaluation Questionnaire which you completed and returned. Thank you for your response. This letter highlights the results of that survey and also updates the progress of docent tour evaluation at The Oakland Museum.

Questionnaire Highlights: Based upon responses from 25 Western Museum Docent Councils

1. Minimum docent commitment after training—average - 2 years; range - no requirement to 5 years.

2. Required primary training period—average - 6 months; range - 6 weeks to 1 1/2 years.

3. Who conducts training?—a combination of the following; staff, university classes, docent coordinator, outside experts, and advanced docents.

4. Do you have a system for implementing on-going evaluation for graduate docents?—Yes - 9 responses, by staff, advanced docents, or docent coordinator; No - 16 responses, because of docent resistance, dislike "big brother" attitude, or rely upon docent self-evaluation and less effective docents dropping out by their own choice.

5. Do you have mandatory continuing education?—overwhelming yes, usually monthly meetings or lectures and sometimes yearly research papers are required.

6. How do you terminate docent service when necessary?—a formal letter.

Oakland Museum Docent Tour Evaluation Update:

Docent tour evaluation began in January of 1977. The Docent Council Bylaws were amended in order to make tour evaluation mandatory for Active docents every three years. A staff member follows a docent on a regularly scheduled one hour tour. Before evaluation, most curators had never followed a complete one hour docent tour; now they do so on a regular basis. After the tour, the docent and the curator discuss the tour considering the criteria outlined in the Tour Evaluation Form. The Tour Evaluation Form was drafted by docents with staff approval. Tour evaluation has been progressing slowly but consistently. There has been some resistance by docents but most docents have cooperated and have appreciated the opportunity to sharpen their skills. The staff has been supportive and provided brush-up lectures, etc. Only a few docents have required additional training. Should a docent prove to be not up to standard after additional training, the docent is requested to assume Associate status. This has not happened to my knowledge.

Suggestions for Tour Evaluation:

1. Have every docent, not just the Board of Representatives to the Docent Council, approve of the evaluation and help formulate its development.
2. Allow the docent to select the type of tour with which he or she is most comfortable, i.e. age level, etc.
3. Designate a docent evaluation chairperson who will schedule the evaluation tour date which is agreeable for docent and staff.
4. Encourage the curatorial staff to offer brush-up lectures for docents who are to be evaluated.
5. Stress that tour evaluation develops docent tour skills and self-confidence, promotes docent/curator rapport, and points out to the training staff the strengths and weaknesses of the docent training program.

We hope the shared results of our tour evaluation program are helpful and of interest to you. Please inform us about any tour evaluation programs that you have experienced.

Sincerely,

Mary Morrison
Oakland Museum Docent Council

enclosure: The Oakland Museum Docent Council Tour Evaluation Form 11/76

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THE OAKLAND MUSEUM DOCENT COUNCIL

TOUR EVALUATION FORM

Docent		Class

Department		Date

Evaluation Criteria

1.	Knowledge:	Command of fact, understanding of concept, accuracy and wealth of detail.
2.	Collections:	Use of object, specimen, or media to support concept, survey or detail.
3.	Group Interaction and Communication Skills:	Methods of presentation, adapting to tour group needs, speaking ability, general manner.
4.	Tour pace:	Logical sequence, transition, anticipating alternatives, timing.

Comments pertinent to those skills needing improvement:

Rating: ○ Standard ○ Requires additional Training

(Docent Signature) (Date) (Staff Signature)

11/76

Two response forms developed at the Helen Foresman Spencer Museum of Art, University of Kansas (Laurence, KS) for the use of children who have had a museum lesson. These evaluate the experience rather than the docent's "performance."

Make Us See Each Unique Meaning

Will you share you ideas and feelings with us?

1 Why do you think people make paintings and sculptures? ______

______

Why are some artworks in a museum, while others are not? ______

______

2 Did you find some artworks in the museum that made you feel the following:

	Yes	No		Yes	No
good	___	___	curious	___	___
sad	___	___	other ______		
happy	___	___			
angry	___	___			

Would you describe one of the artworks and tell how it makes you feel. ______

______

3 Please share any other feelings you have about the museum. ______

______

the classroom presentation ______

the museum building ______

4 What does it mean to "create"? ______

What do you create? ______

Does an artist create? ______

Do you feel like an artist when you create? ______

5 Tell about an object in the museum and what you would like to ask the artist who created it. ______

______

6 Please use the other side of this page to draw a picture, write a story, or write a poem inspired by what you saw at the museum.

thank you!

• what do you think??

1 These elements go into making a painting. Where can you find them inside or outside of the classroom?

	INSIDE of Classroom	OUTSIDE in Nature
Line		
Shape		
Space		
Color		
Light		
Texture		

2 If you could choose a painting or sculpture to take home with you from the Museum, which one would it be? Please tell us why.

____

____

3 If visiting another planet, which work of art in the Museum would you like to show to tell about America, past or present? Tell why.

____

____

4 Which game did you like playing in the Museum? ____________________

____

5 Imagine that the world around you is all one color. Write a poem or draw a picture on the other side of this page about how that color makes you feel.

thank you!!

Once again we borrow from the excellent handbook produced at the University of Texas Art Museum (Austin, TX.)

IV. A GUIDE FOR THE EVALUATION OF A DOCENT TOUR

Some Information Needed First

Make-up of the group: Age, class, size, special interest, special problems or cultural background. All boys? All girls?

Teacher: Attitude toward the tour, toward the class; did the teacher comment about how she intends to use the tour in class, about preparation before the class came to the museum?

The Plan

Theme: Was there a theme to the tour? Was it interesting and pertinent? Did it follow a logical order?

Material: Were the docent's facts correct? Did it include most of the important points in the exhibition? Did the docent introduce himself or herself to the audience? Did the docent ask about the special interests of the group?

Time: Was there enough time allowed to cover the entire exhibition?

Presentation:

Manner: Was the docent courteous, pleasant, excited, involved with the audience? Was the tour relaxed and *easy?* Did the docent welcome interruptions in the form of questions or comments? Did the docent seem to share knowledge, rather than expound? Did the docent *speak down* to the audience, or use language *over their heads?*

Voice: Did the docent speak distinctly? Were words slurred? Was the docent concerned that everyone could hear and understand?

Rapport: Did the docent include all the members of the audience in the talk? Could everyone see? Was the audience looking at the docent or at the objects in the exhibit most of the time? Was a good method used for including the *restless fringe?* Was there a method for *changing pace* if the audience got restless? Was the docent aware when the audience got restless?

Docent techniques: Did the docent move the group from one place to another in a well-defined way? Did the docent face the audience? Did the docent keep them in one area too long? Did they move too fast? Were special instructions given about the use of the stairs? Did the docent see the group *to the door* before leaving them?

Preparation

Does the docent seem well prepared? Was there enough information to make the tour interesting and informative? Does the docent rely on notes? Does the docent rely too much on objects or books brought to the tour?

Does the docent know the physical set-up of the museum and the art building? Is the docent familiar with the exhibitions in all the galleries? Does the docent follow the *moving pattern* determined beforehand, when there are more than two groups in the museum at the same time?

Did the docent add his or her *own* discoveries? Did the docent have a unique or special approach? Was it *right* for this group? Did *you* learn something new about the exhibition from this docent's tour?

Some Questions

What techniques or information would you add to your own tour, which this docent's tour inspired?

Do you see some of your own mistakes or weaknesses reflected in this tour?

What were the greatest strengths in this tour? The greatest weaknesses?

How would you assess the tour in terms of its success or failure in relation to the group to whom it was addressed?

In 1975 two graduate students from the George Washington University MAT in Museum Education program ran a series of 4 workshops for docents at the Hirshhorn Museum and Sculpture Garden. These in-service workshops were an internship project for the students, as was development of these evaluation forms to be filled in by participating docents. The first page is used to evaluate each separate workshop. The second page evaluates the whole experience.

[redacted]

Evaluation:

These best aspect of this workshop was ______________________________

The worst aspect was ______________________________

I particularly began to think about ______________________________
____

I learned about the workshop through ______________________________

I would attend a similar workshop on a different subject - yes no

A more convenient time for me would be ______________________
Because ______________________________

I felt the workshop enriched my training by ______________________

I feel less intimidated because ______________________________

I really didn't need these workshops but I came because ______________
____

I was (please circle) from this meeting

bored, challenged, worn-out, sparked
inspired, scared, relieved, encouraged
frustrated, offended, helped
confused, enlightened, relaxed, depressed, other: ______

THANK YOU FOR YOUR TIME AND CONSIDERATION

BEST COPY AVAILABLE

for those who have given so much...I ask just a little more

WORKSHOP EVALUATION - you may - name ______________________________

FOR THOSE WHO ATTENDED ALL FOUR - you, trooper, you!

1) These augmented my training by adding: ______________________________

2) The MOST useful workshop has been ______________________________

Because ______________________________

3) It would have been more helpful if ______________________________

4) In order to have future workshops I would be willing to help: ______________________________

5) The highlights of these four sessions have been ______________________________

6) The biggest problem has been ______________________________

7) Two hours is too long/ okay/ good with a break/ suits me fine

8) I found too much repetition / paraphrase that penetrated

Continuity that became increasingly clarified/ vague associations

the order was logical and helpful // I would rather have had ________ first

9) I think the two~~se~~ goals for each day have been -please circle
(the two most strongly conveyed..or ideas that were emphasized)

QUESTIONS

a. To reveal the various levels of questions involved
b. To emphasize goal of looking
c. To give docents questions to use
d. To point out the importance of questions
e. To convey important aspects of questions
f. To cause careful consideration of questions

TOUR DESIGN

a. The method docents should use
b. A framework to consider
c. Giving a demonstration tour
d. Spark thinking about tours
e, Emphasize the CONCEPT
f. Emphsize the purpose
g. Introduce a useable process

TECHNIQUES

a. Approaches to be used
b. Things to consider when using a technique
c. The purpose of the technique
d. To have participation
e. Directives are the best
f. How to implement a technique

SPECIAL CONSIDERATIONS

a. Discipline is a problem
b. What to do in a crisis
c. Things to consider - be aware of
d. Pointing out particular problems
f. Age characteristics rules
g. The purpose of the value of such knowledge

During these four days we wasted more time:

IN BRIEF

This section is a compendium of surveys done by museum educators of volunteer programs around the country. Two of these surveys focus on the nature of the programs: length and content of training, structure of the volunteer organization, types of service and the like. The third survey, done in the early 1970s, simply lists the variety of services, rewards and organizational structures of the programs that responded to a questionnaire, and is valuable as an overview of practices.

In this section you will find:

--the results of a study by Gretchen Sibley for the Docent League of Southern California;

--a 1975 survey made through visitation to a number of sites by Judy White, Coordinator of Educational Services at the National Zoological Park, Washington, D.C.;

--a collection of summaries of docent programs excerpted from the proceedings of the Docent Forum, California, Bay Area.

DOCENT/VOLUNTEER PROGRAMS

Docent/Volunteer programs are springing up all over the United States. Recent contacts with other groups in Southern California led to questions about programs in other parts of the country and resulted in this survey of a limited number of institutions. Details of the findings are included in the following pages.

Generally it was found that docent/volunteer groups have certain characteristics in common. The term "docent" may be reserved for those who teach or it may refer to all volunteers. Sometimes "docent" is not used and all are called volunteers. Thus we refer to the programs as "docent/volunteer" programs. Ninety-five percent of the institutions replying indicated they maintained such a program and the rest were planning for the future.

In Los Angeles and Orange Counties we have established a Docent League, an unstructured group which meets about three times a year. Two or three representatives from each docent organization gather to exchange ideas and discuss problems. Institutions and their needs vary, but certain aspects of any of these programs lend themselves to a variety of situations.

Certainly the vast numbers of intelligent, educated women available for volunteer work may be a great asset to a cultural institution. Proper guidance, efficient group stucture, adequate training and supervision, and a recognition of the needs both of the volunteer and the institution are paramount in establishing a strong docent/volunteer program.

Gretchen Sibley
Museum Education Specialist
and Director of Docent Program
Natural History Museum,
Los Angeles

Report on a survey of Docent/Volunteer programs
in the United States

Made by Gretchen Sibley, Director of Docent Program
National History Museum, Los Angeles, California
900 Expostion Blvd., Los Angeles 90007

In the spring of 1973, 375 insittutions listed in the "Official Museum Directory" of the American Association of Museums, were sent questionnaires regarding Docent/Volunteer programs. Institutions were chosen at random within each state, providing the listing indicated an education program. The findings listed below follow the pattern of the questionnaire. Replies indicate percentage of times certain activities are mentioned.

Replies: 32% returned a completed questionnaire (114)

TYPES OF WORK PERFORMED BY DOCENT/VOLUNTEERS

Teaching school classes:	
At Institution	76%
At Schools	32%
Lecturing to adults:	
At Institution	55%
Outside	25%
Curatorial assistance	54%
Preparing meals	13%
Research	43%
Gift Shop	52%
Book Shop	23%
Hostessing	59%

Other Activities (1 to 15%)
- Children's Pet Fair
- Suitcase Program
- Clerical work
- Tour guides outside museum
- Museum on Wheels
- Film strip preparation
- In-service teacher training
- Assistance in field work
- Fund raising
- Extension service
- Information desk
- Children's hospital
- Braille Institute classes
- Library work
- Art lease
- Translation
- Newsletters
- Tours in foreign languages
- Movie programs

Registration of visitors
Ground maintenance and beautification
Plant sales
Preparation of audio-visual material
Children's theater
Children's science clubs
Writing material for touring docents
Junior Museum aids
Puppetry

DOCENTS ARE GIVEN RECOGNITION FOR THEIR WORK IN THE FOLLOWING WAYS

Personal thanks
Newspaper articles
Luncheons
Teas
Dinners
Open House
Cocktail parties
Certificates
Pins
Stones set in pins for additional time
Plaques
Badges
Charms
Medallions for outstanding work
Gifts
Special recognition for volunteer of the year
Honorary membership for extended service
College scholarships
Letters of recognition
University credit for training
Part time work with pay
Grades
Names recorded in annual report of the institution

TRAINING OF DOCENTS/VOLUNTEERS

Length of time for basic training:

Training varies from one day to twelve months. In most cases the training is on a one-day-a-week basis. Obviously time varies with complexity of material available to be covered. The average time allotted to training is eighteen weeks,one day a week.

Personnel Used for Training

Staff Members . . .	85%
Outside Speakers . .	39%
Trained Docents. . .	48%

Types of Training

Lectures and/or classroom & gallery teaching 80%
On-the-Job Training 40%
Tours and Field Work. 22%
Seminars & Workshops. 31%
Research. 21%
Other Methods (1 to 15%)
- Teaching Techniques
- Films
- Discussion
- Reports
- Voice
- Writing
- Library
- Demonstrations
- Observation of other Docents

Most programs include in-service training as needed

DOCENT ORGANIZATION

Chairmen or President 40%
Committee Chairmen 38%
By-Laws 35%
Membership meetings 45%
- Monthly . . . 22%
- 4 per year, 3 per year, annually, bi-annual equally mentioned.

Programs at meetings . . . of about equal mention
- Business
- Lectures
- Field Trips
- Tours
- Work Sessions
- Informal coffee meetings
- Films
- Staff Speakers

Recording of Hours:
- Book
- Roll call
- Time clock
- Log
- Time sheets
- Postcards
- Sign-in sheets
- By "Docent-of-the-Day"
- A few do not record hours

Docents covered by Insurance - 31%

* * * * * * * * * * * * *

Note: Most of this report is the work of Docents. One chose the institutions to be contacted and addressed the envelopes. Another recorded the material on charts so I could write up the results more easily. And another mimeographed and mailed the material.

GLADYS PORTER ZOO, BROWNSVILLE, TEXAS

Contact: Don Farst, Director / through Ed Kohn
Staff: One full-time
Budget: Approximately $45,000

Docent Recruitment

Recruitment is done through general promotions. There are 125 docents. Twenty percent of these are teen-agers both men and women. Another 20% are retired persons, again equal number of men and women. All docents must join the Zoo's society, and agree to serve at least 50 volunteer hours a year.

Tours

Tours are primarily for school groups.

Training

A training program, conducted by the curators is given every year. Classes last for 26 weeks, meeting once a week for two hours during the evening. See "Table of Contents" in Appendix for an idea of course content. There are no formal tests, although self-tests are available.

Continuing Education

Docent seminars are offered each month.

Other Volunteer Duties

Docents are involved in a wide variety of activities. Some guide tours, others are stationed in buildings to answer visitor questions, others are zoo-train commentators, or clinic helpers, information persons, helpers in the diet kitchen, or helpers in the Children's Zoo.

ARIZONA-SONORA DESERT MUSEUM, TUCSON, ARIZONA
Contact: Doris Ready, Supervisor, Education Department
Staff: One full-time supervisor
One full-time secretary-scheduler
Budget: Approximately $35,000

Docent Recruitment

Recruitment is primarily by word-of-mouth. Response to first announcements when program started four years ago was so great there has been no further need to advertise. Applicants must be over 18 years old and a $20.00 fee is charged for the training. There are about 100 active docents plus 45 new ones in training. They have a variety of educational backgrounds from high school training to Ph.D.'s. Some docents are college students and retired persons. The museum is actively seeking to recruit Mexican-Americans and bilingual persons. There are no blacks. Docents must give 16 hours per month to the museum. This includes their travel time.

Tours

Tours are offered for second through eighth grade. Pre-school and first grade classes are given a seated program with live animals on the grounds. Tours cover the general collection which is thematically organized and stresses the ecology of the region. Docents are encouraged to talk informally rather than deliver "canned" lectures. Groups are divided into ten children per docent. About 80 children are toured per morning.

Training

A yearly training course is taught by the curators. It lasts 15 weeks, meeting once weekly for three hours. A similar course is also offered in the evenings to accommodate college students who want to be docents. Although the course is not offered for credit, they are considering doing so. The focus is on the ecology, and natural history of the region (see "schedule" in appexdix). A mid-term and final exam are given. Two observation tours and two practice tours are required.

Continuing Education

One day a month there is an advanced class given. These also include methods.

Contacts with curators are frequent and docents are treated like staff members.

Other Volunteer Duties

Not all docents give tours. Some are stationed on grounds to answer general visitor questions. Others help out curators. Some run the animal nursery. A few have been hired to teach the museum's summer classes. Others are involved in one of the museum's two outreach programs:

1. The Visiting Van Program in Environmental Education.
2. Taking animals out to schools.

Pre and Post Tour

A film strip introduction to the museum and a written teachers guide are available for teachers.

Special Tours

Bilingual tours are being started.

Curators' Comments

Atmosphere of the museum is casual and friendly. Docents and other Museum staff work together closely.

CALIFORNIA ACADEMY OF SCIENCES, SAN FRANCISCO, CALIFORNIA
Contact: Diane Butler, Coordinator of Docents
Staff: One two-thirds time coordinator
Budget: $6,000 ($5,000 salary and $1,000 office expenses)

Docent Recruitment

Recruit by advertising in Society's publication and by word-of-mouth. All docents must be members of the Society. Application and interview required for screening purposes. A fee of $45.00 is charged for the training course, plus docents must agree to serve three mornings per month for two years.

At present there are 80 active docents, with another 40 in training. They consider 100 an optimum number. Most are women: 1/3 with a professional experience, 1/3 with teaching experience, and 1/3 interested lay people. There are no minority groups represented although they tried recruiting.

The coordinator remarked that tours for Junior High are impossible because they are "too involved with self". Docents offer regular tours (see appendix) and a few specialized tours. They limit themselves to five or six children per docent. Tours are given weekday mornings. They reach one-and-a-half million visitors per year. They estimate 10% of visiting children are toured.

Training

New docents are trained every other year. Applicants are accepted only to fill vacancies. Classes are taught by curators plus a few outside lecturers. (See "lecture schedule" in appendix) It meets for 22 weeks, three hours each week. Credit is offered through San Francisco State Univeristy. The course is primarily college level biology, stressing taxonomy and relating to the museum's collection as much as possible. Each lecture class begins with a pre-lecture tour of the museum's habitat groups. Exams are given. No one has ever failed, but some drop out when they realize they cannot handle the work.

Continuing Education

After one year of tour experience a docent is eligible to take a 12 week, two-and-a-half hour advanced course in a specialized area:

1. Aquarium (Steinhart)
2. Earth sciences
3. Anthropology

These are all taught by curators. Upon completion the docent is then qualified to lead tours in those particular areas of the museum. Prior to that she could only give general tours.

Monthly enrichment seminars, field trips, such as wild flower walks are offered to all docents.

Other Volunteer Duties

Docents will serve in "SuperVan" outreach program in schools.

Pre and Post Tour

Packet of information is sent to schools before tours. A slide orientation (for tour groups) in museum before tour is being tried with good results.

Special Tours

Sign language tour for deaf is being started.

Curator Comments

Docents do not have much contact with curators except in the formal class. Curators are primarily involved in research but they seemed pleased with docent program.

SAN FRANCISCO ZOO, SAN FRANCISCO, CALIFORNIA
Contact: Laura LaMarca, Education Specialist
Staff: One paid; mostly works with Zoo-Mobile

Training is a 13 week course, one-half day per week. DOcents are the instructors. In the past classes were taught by professionals and curators. The Zoo has a new director and projects are in a period of change, so we did not pursue this program further.

SAN DIEGO ZOO, SAN DIEGO, CALIFORNIA
Contact: Charles McLaughlin, Director of Education
Staff: Four full-time, Director, secondary teacher, primary teacher,
Speach Specialist
One half-time teacher
Budget: $92,000

The Zoo does not have a docent program. Tours given by the staff teachers are offered to grades two, three, six, and high school (see "brochure" in appendix). In-school assemblies featuring slides and live animals are offered for grades four and five.

Self guiding materials prepared by zoo and other agencies is distributed by the school system.

LOS ANGELES ZOO, LOS ANGELES, CALIFORNIA
Contact: Kay Jamison, volunteer education coordinator GLAZA
Staff: One full-time scheduler
One half-time secretary
Budget: $10,000

Docent Recruitment

Applicants are recruited by newspaper and word-of-mouth. Costs to a docent total about $80.00 and cover training notebook, uniform, and GLAZA membership. There are about 200 docents, all women. No minority groups.

Tours

The majority of tours are elementary school groups. Tours can be tailor-made according to needs and interest. Tours are given in the morning. Group size is about 8-10 students per docent.

Training

Training is offered every year to about 30 potential recruits. The course was originally taught by the zoo director and curators. Now docents teach about a third of the classes. The course meets one day a week for five house and lasts 18 weeks.

It is offered for credit through UCLA and mid-term and final exams are required. Some prospective docents fail and others drop of their own accord.

New recruits must serve one year as provisionals before they become official docents. During this time their tours are evaluated by a team of experienced docents.

Continuing Education

Staff development courses and seminars are offered.

Other Volunteer Duties

The Docent Council is involved in extensive activities (see brochure). Many serve on the Zoo-Mobile.

Pre and Post Tour

Some background materials are sent to teachers.

Special Tours

Exceptional children program is offered (see appendix).

HOUSTON ZOOLOGICAL GARDENS, HOUSTON, TEXAS
Contact: Phylis Moore, education officer / through Ed Kohn
Staff: Two full-time

Docent Recruitment

The number of docents grew from 19 in the first program seven years ago to 102 at the present. Minimum age for applicants is 18 years. They must pay a $20.00 registration fee, and offer to serve two mornings each month.

Tours

There are no guided tours of the Zoo.

Training

A five-week training course meeting twice weekly is offered in the spring and fall. The director, education officer and curators teach it. A course in communication skills, "Assertion Training for Docents" is offered through the Houston Civil Service.

Continuing Education

A one-day refresher course is offered. Additional training available for docents giving House tours.

Other Volunteer Duties

Practically all docents work in the Zoo-mobile which takes programs including live animals and materials out to the schools. Special "House Tours" of selected zoo houses have just been started, conducted by docents with advanced training.

Evaluation

A series of questionnaires were sent to schools to evaluate the Zoo-mobile program.

NATIONAL PORTRAIT GALLERY, SMITHSONIAN INSTITUTION
Contact: Dennis O'Toole
Lisa Strick

Docent Recruitment

A notice in "Ann's Readers Exchange" in the Washington Post has been the most successful method. Word-of-mouth is second. Ads were placed in the Smithsonian Associates Bulletin, a few local papers, and the Afro-American, with few results.

Tours

NPG offers tours and programs to elementary school, adult and high school groups. Volunteer guides conduct programs for elementary and adult. A paid staff handles the high school program.

Composition of Volunteer Group

NPG thinks their guides are a little more varied than the average museum guide group. There is a total of 45 guides, 17 were trained this year. The annual turnover rate is about 20%. In the present group are three men and one black woman. The rest are white women. About 1/4-1/3 are retired. There is an increasing number of young women with small children this year.

Volunteer Schedule

Guides are required to work 1-1/2 days per week. The full day (from 10:00 to 3:00) is spent in the museum giving tours. The half day is spent in an elementary school giving an introductory lecture. One of the full days must be on a weekend several times during the year.

The School-Museum Program

A guide visits a class in their school before their museum visit with a pre-trip program. With slides, she covers the following points:

1. Introduction to NPG: What the building looks like. What's inside: portraits!
2. How to read a portrait: Be a detective. What clues can you you see in the picture that tell about the person.
3. Then kids do a short portrait-drawing activity.

Dennis O'Toole says the pre-trip visit has really meant the difference between success or failure of the program. By the time the kids enter the museum, they are already oriented, know how to behave, and most important, have experienced using "looking" skills.

Training

Potential volunteers are interviewed, and invited to introductory session. A two-week period follows in which they observe the program in the schools and in the museum. Some volunteers drop out at this point.

Emphasis in training is on developing interpretation skills, such as question-raising story-telling. Training is "fun and lively". Dennis and Lisa try to "involve" the docents in the same way they will "involve" the kids. There are few lectures. Emphasis is also on docents developing their own tours and own style. Docents are introduced to the collections by the curators themselves. They are not given fact sheets on painting, but have access to files on each painting to look up resource material. They are occasionally given original source material or an especially interesting article to read.

Continuing Education

Trips are offered throughout the year to a variety of historical places or shows. Whenever a new show is to open docents are briefed and brought up-to-date.

Evaluation

Tours are spot checked. Dennis says self-evaluation would be the best method if possible to do.

PHILADELPHIA ZOOLOGICAL GARDENS, PHILADELPHIA, PENNSYLVANIA
Contact: Janet Jackson, President, Docent Council
Staff: All volunteer
Budget: About $2,000

Docent Recruitment

The Docent Council of the Zoo started many years ago as a branch of the Junior League, and recruitment was done by the membership through word-of-mouth/invitation. Now they are trying to broaden their base and recruit through public advertising. There are 45 active docents and another 35 in training. Two of these are men. A $25.00 fee to cover class fees and text book, plus $20.00 Zoo society membership is charged all volunteer applicants. They are asked to volunteer one morning per week but no contract is required.

Tours

Tours are mostly for elementary groups; a variety of other kinds of activities are offered (see Other Volunteer Duties).

Training

A training course taught by curators and docents is offered each fall for new recruits. It meets weekly for three hours and lasts 17 weeks. Content seems to consist of facts about each animal group followed by a walkby tour of the collection (see attached "Docent Training Program").

Continuing Education

A one-two day brush-up course is offered docents each year. They are looking for a "better method" of continuing education, a college level animal behavior course for docents interested in helping zoo curators with studies.

Other Volunteer Duties

Tours are only on docent activity. Some conduct the mobile program which goes out to school classes daily. Some are involved in a number of experimental projects such as supervising. Others work with a group of high school students who are doing "behavioral studies" of zoo animals as class projects, or conducting a story hour for pre-schoolers and their mothers. Others assist curators, teach classes.

Pre and Post Tour Materials

Limited material available for teachers.

The Docent Forum: A Market Place of Ideas

APPROACHES TO DOCENT TRAINING

Every docent program provides training for new docents; teaching information about the collection and techniques for communicating this information to the public. During the Forum the participants discussed these three aspects of training: training priorities, implementation of training programs, and docent-staff relationships.

Training Priorities

In order for a training program to be successful, integration of command of subject matter with communication skills was stressed by all of the participants. Emphasis of one over the other prevents a docent from being an effective teacher. Subject matter includes learning about the exhibition by being given accurate and interesting information about the collection. These skills can be provided in gallery talks, lectures, slide presentations, working with artifacts, and in selected readings. Communication skills encompass the ways in which you can involve your audience on a tour. They comprise learning inquiry techniques and focusing questions, planning objectives, methods for assessing your audience so the tour is appropriate, pacing and sequencing of the tour, flexibility in method of presentation (dialogue, inquiry, lecture), role-playing, and body movement. Both teaching techniques and subject matter can be taught by members of the staff, docents, and consultants.

Implementation of Training Programs

a. Explanation of Program: In order to minimize drop-out during training and to ensure that docents understand their new undertaking, the program must be fully explained. Time committment, rigorousness, and training procedures must all be carefully outlined for the applicant.

b. Selection of Docents: Staff or volunteers who select docents should be able to articulate the qualities that they are looking for. Enthusiasm for the subject matter and a desire to share this with others were often cited as the most desirable characteristics of the applicant.

c. Evaluating Training: Throughout the training process, the trainers should be receiving feedback about their procedures from the trainees. This will aid in planning future training programs and will eliminate many of the problems that become evident when touring begins. The weaknesses in docent performance arise directly from weaknesses in the training program and may include a lack of integration of teaching techniques with content, less than adequate training in communication skills, and a lack of sharing of techniques among docents. Training procedures could be strengthened by having trainers and docents working together on the planning of training programs, by having docents help each other with sample tours, team touring, tag-a-long tours and peer evaluation. Staff members are an important asset and can provide examples both in innovative touring techniques and in setting up innovative programs.

Docent Staff Relationship

In order for any training program or on-going program to achieve its goals, communication between staff and docents must be diligently maintained. A "we-they" situation is detrimental to everyone and the public suffers the most. A close relationship should be maintained after the official training period is over for docents appreciate continuing education programs and the opportunity to contribute their ideas at the inception of such programs. The desired outcome of training and continuing education is to grow, improve, and constantly challenge one's limits.

Evaluation - Why? How? By Whom?

Why? The objectives of an evaluation program should be to determine both the effectiveness of the docents' performance and the effectiveness of the training program. Evaluation should be set up on the premise that docents want to continue to improve their tours. The areas that evaluation can successfully measure are: a) factual content, b) organizational ability, c) communication skills--methods for involving tour groups, and d) group responsiveness. The selection of what will be evaluated is important for it will determine how the evaluation is conducted and the results. These must be clearly understood by all involved in the evaluation process and relate directly to the Why.

How? Many institutions have already begun evaluation programs. These programs are as varied as the institutions themselves. They include: a) evaluation of

on-going gallery tours, b) a written or oral examination, c) projects, d) taped tours.

In the Natural Science department of the Oakland Museum a docent gives a tour with two staff members along. The Docent Council by-laws require evaluations every three years. Evaluations there, thus far, have been done by the curator of each department.

At Stanford they have docent evaluations every two years. The docents evaluate each other and the results are reviewed by the Director of Educational Services.

At the San Francisco Museum of Modern Art the docents review their tours with the education staff on an on-going basis, but the procedure is not formalized. Many of the small institutions have informal evaluation procedures and plan to formalize their procedures one they have clearly sorted out what they want to evaluate.

Who? The selection of the evaluator is very important and will clearly determine the outcome of the process. It is very important to determine what you want to evaluate before selecting the person. Possible choices are self, peers, staff and tour participants.

Tape recording one's own tour and having it evaluated by staff or another docent may be less intimidating than having someone accompany the tour in progress.

Another technique is to have the group evaluate the docent by asking them questions at the end of the tour to determine if the tour objectives were met. Questionnaires could also be distributed for immediate or mail-in response.

Self-evaluation has interesting possibilities but only if one is trained to listen to other's tapes to learn what to listen for.

Advantages and Disadvantages of Evaluation

Advantages: Most of the docents agreed that some form of evaluation was necessary for both the docents and the staff. The trained docents felt that it gave them the chance to review content and touring procedures. They felt that it gave them the opportunity to correct factual errors and helped keep themselves up-to-date about exhibitions. Communication between the docents and staff was enhanced and made the staff much more sensitive to the problems and potentials of touring. Finally, they felt that the long term effects of evaluation were positive because they helped docents create better tours.

Disadvantages: Some docents see evaluation as a personal evaluation and think that it is too subjective. They often feel that the staff is only concerned with factual information and not with the manner of presentation. They feel intimidated by members of the staff and if there is not a close working relationship they tend to

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DOCENT FORUM: A
Market Place of Ideas

April 25, 1977
Oakland Museum, Oakland, California

LEGAL AND POLITICAL NOTES

The Women's Movement, the "self-awareness" movement, and the acknowledgement of the considerable price tag that can be placed on volunteer contributions to museums have focused attention on issues of responsibility and recognition of service by museums for their volunteer workers.

Some of these issues are addressed in this section. You may wish to explore your own state and local laws pertaining to volunteer service. The new Virginia statute on volunteers, summarized in this section, is considered by activists in the field of voluntarism to be a positive model.

In this section you will find:

--"Yes, Insurance is Necessary," prepared for the Volunteer Bureau Division of United Way, San Diego, California;

--The Virginia State Government Volunteer Act, as summarized in Museum News by Ellen Straus;

--A summary of two recent articles on the state of voluntarism in the United States, by Peggy Blechman;

--Recommendations for providing tax credit to volunteers, prepared by the Erie County (New York) Volunteer Association.

YES - INSURANCE IS NECESSARY!

Review of Problems
Human Care Service Entities
Are Experiencing
With
Insurances

for

California Volunteer Network

by

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INTRODUCTION AND FOCUS

A disturbing contemporary fact of American nonprofit, charitable organizations in the human care service field is that they are increasingly subject to a variety of legal actions and threats of suits. As our society has changed, the former immunity of charitable organizations from liability in their actions has been withdrawn. The State of California holds the organization is not existing for purpose of yielding profits, it is considered a charitable organization. Further charitable organizations are subject to the same responsibilities as any other business corporation.

Each agency is tending to deal with the matter on a separate basis interpreting available information, relying on insurance agents and legal advice in face of rapidly changing requirements. Much of the lack of clarity results from the void of legislative precedents, research, known threats of suits, insurance vaguarities, and high costs/low budgets.

This attempt to study the current problems being experienced has been hampered by the agencies lack of information and their reluctance to reveal current problems. Two separate surveys were conducted -- one to a broad sampling of nonprofit organizations (private and public) focused on obtaining types of currently carried insurances and connected problems. The second was administered to a smaller sampling in an attempt to obtain information on the rise in premiums and pending/ settled suits or claims.

In general, the problems identified were mainly in following areas:

-Rapid escalation in insurance rates in the last three to five years for general or public liability (low of 50% increase to of 359% increase with sample size of 60).

-Exclusion of coverages for volunteers in specified roles.

-Lack of agency's coverage of their board by Directors and Officers Liability Insurance either due to cost or lack of knowledge.

-Agencies experiencing cancellations of policies because of threats of or occurrence of claims.

-Ability/requirement of providing Worker's Compensation for volunteers.

-Liability of agency and bureaus for actions of volunteers.

TYPES OF RECOMMENDED INSURANCE COVERAGES

General or Public Liability - Definition

General liability insurance provides coverage for a combination of issues arising from indirect liability. In essence, general liability protects the agency against claims by third parties injured in

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agency functions. However, it does not provide coverage for those actions for which directors and officers are directly responsible. Coverage usually includes bodily injury, property damage, and procedural problems resulting from staff actions.

Common Problems

-Rapid rise in premiums.
-Cancellations due to claims.
-Cancellation due to coverage for volunteers in staff-like roles.
-Difficulty of defining volunteer and insurance companies view of lack of control over volunteers.

Discussion

It is highly recommended that all nonprofit, private agencies or associations of volunteers purchase this type of insurance due to recent trend toward higher court settlements and advent of suits against groups or agencies. Further, that all agencies fully inform volunteers of liabilities they assume in volunteering.

Directors & Officers Liability - Definition

As of 1972, all states except Idaho and Illinois had enacted some form of statute regarding the indemnification of corporate officers and members of boards of directors. Directors and Officers Liability Insurance prevents suits directly against the members for either wrongful or alleged wrongful acts committed in their individual or collective roles as directors of the organization. Again, this is applicable to incorporated groups or formal associations.

Common Problems

-High cost of premiums.
-Finding an insurance carrier.
-Programs funded by grants but still under the directors while not contributing to cost of insurance as part of grant.

Discussion

Some agencies and groups are not applying for this type of insurance due to cost; however, they do run the risk of their directors being individually sued. Therefore, it is recommended

-agencies carry this insurance.
-explain lack of coverage to each director and risks involved.

Lawyers are recommending to prominent persons not to serve on boards which are not indemnified against such suits in by-laws and where Directors & Officers Liability Insurance is not provided.[1] An alternative is for each member to carry his own insurance.

Worker's Compensation - Definition

In California, this insurance is state regulated and required for paid employees unless waivers through self assurance or other guarantees. Recent changes in California's Labor Code does allow each corporation to make their own decision regarding providing Worker's Compensation to volunteers:

Labor Code - Section 3363.5 "A person who performs voluntarily service without pay for a public agency, as designated and authorized by the governing body of the agency or its designee shall, upon adoption of a resolution by the governing body of the agency so declaring, be deemed to be an employee of the agency for purposes of this division while performing such service."

Thus, volunteers would be provided medical coverages but not any sort of wage reimbursement. Generally, this insurance does provide medical coverages for injuries incurred as a result of an on-the-job accident. Additionally, the employee's wages lost as result of the injury are reimbursed. The premiums are based on salaries paid to employees.

Common Problems

- Escalating costs.
- Arbitrary decisions on premiums if volunteers are covered, i.e. value of volunteer time and definition of volunteer.
- Insurance companies reluctance to cover volunteers at all due to agency's lack of control as versus control of staff.
- Insurance agents refusing to cover paid staff without including volunteers at a much higher premium.
- Agencies being unclear as to requirements.
- Insurance companies are becoming reluctant to provide Worker's Compensation: large exposure, high losses in California and extent of coverage required by law.

Discussion

Many organizations are unaware of their potential employer liability to their volunteers. Coverage by Worker's Compensation provides this coverage and lessens risk of suit. According to the California Labor Code (1974): "...a person who performs voluntary service without pay for a private, nonprofit organization which is exempt from federal income tax under subsection (c) of Section 501 of the Internal Revenue Code, as designated and authorized by the board of directors of the organization, in its sole discretion so declare, be deemed an employee of the organization for purposes of this division while performing such service."

For agencies carrying accident insurance covering volunteers, Worker's Compensation would be duplicate coverage. Worker's Compensation is "no fault" with volunteer only needing to show they were not grossly negligent. Accident insurance is usually much more limiting and sets limits on amount the volunteer can collect. Additionally, the cost of Worker's Compensation is likely to be greater in premiums than accident insurance.

Excess Automobile Liability - Definition

Although jointly liable, agencies are liable for actual or alleged negligent use of an automobile by a volunteer driving on behalf of the agency. Additionally, it is incumbent on the agency to be assured the volunteer, when using their personal auto, does carry their own liability insurance on the automobile. In event of accident/injury, the volunteer's own insurance is claimed against first, and when it is used up the agency becomes liable.

Common Problems

- -Again arbitrary definition of volunteer and of the risks involved.
- -Insurance companies reluctance to provide this coverage.
- -Escalating costs.
- -High court awards.

Discussion

Agencies or groups utilizing volunteers using their own automobiles to provide transportation to clients in fund raising activities or other types of services run risk without this insurance. Additionally, agencies or groups should verify the volunteers own current insurance coverage to limits as specified by the state. Agencies have some liability for paid or nonpaid staff operating on their behalf. However, very few insurance companies will provide this type of insurance coverage.

State Fund Director questions whether this insurance is necessary due to low number of claims and most have been covered by volunteer's own insurance. Hartford withdrew this coverage partially due to settling two claims for over $100,000.

Other Types of Insurance for Agencies

Rates on all types of insurance are on the rise although those referenced in preceding are subject to more rapid rises and around which there are the most questions. Other types of insurance which are of concern to agencies are: bonds, medical, malpractice and life insurances. In our survey sent statewide through California Volunteer Network, nonprofit agencies, Volunteer Bureaus and others, sixty-eight returns out of approximately three hundred sent, were received with the following results:

INSURANCES CURRENTLY CARRIED BY AGENCIES

Insurance Type	Yes	No	No Answer
Bonds			
Volunteers	17.6%	64.8%	17.6%
Staff	35.3%	52.9%	11.8%
Directors & Officers Liability	11.8%	64.7%	23.5%
General/Public Liability	82.3%	11.8%	5.9%
Liability for Persons in Program			
Volunteers	70.6%	29.4%	-
Staff	70.6%	23.5%	5.9%

INSURANCES CURRENTLY CARRIED BY AGENCIES (CONT.)

Insurance Type	Yes	No	No Answer
Worker's Compensation			
Volunteers	17.6%	64.8%	17.6%
Staff	88.2%	11.8%	-
Auto Insurance/Accident			
Volunteers	41.2%	52.9%	
Staff	35.3%	47.1%	17.6%
Medical Insurance			
Volunteers	29.4%	58.8%	11.8%
Staff	76.4%	11.8%	11.8%
Life Insurance			
Volunteers	5.9%	70.6%	23.5%
Staff	53.0%	29.4%	17.4%

Of those responses received, the type of agency was:

Public/Governmental	23.5%
Nonprofit, Private	35.3%
Grant Programs (i.e. RSVP)	5.9%
Voluntary Association	5.9%
Volunteer Bureau/VAC	29.4%
Total	100.9%

The number of volunteers enrolled in programs ranged from 108 through 36,000 with a mean between 200 to 600. Size of boards ranged from 13 through 36 with mean around 25. On the average, the agencies contacted have experienced an increase of 14% in public/general liability. Few admit either pending or resolved suits but all requested confidentiality of response to avoid giving publicity to idea of suing.

Problems Experienced by Agencies

No research which would verify accident, etc. rates among volunteers as versus paid staff has been obtainable. The insurance companies and the State Fund remain unfavorably inclined toward providing volunteers any kind of insurance. There is evidence that there is a significantly higher incidence of accident or injury among volunteers. Some authorities suggest the opposite is true. The issues of control of volunteers while on the job and of efficient and effective screening for positions are clearly labeled as reasons for excluding volunteers from coverage and/or requiring exorbitant premiums. Additionally, the insurance companies question the adequacy of training provided volunteers, motivation that they have to perform well in their positions, and the insurance companies maintain that volunteers are generally less adequately supervised on the job.

Insurance carriers state the premiums they receive for volunteers do not match the risks involved. If they could, they would not insure volunteers at all under any policy. Since Worker's Compensation rates are based on salary of staff, and since volunteer staff receive no salary, rates for volunteers with the foreseen risks involved, are set arbitrarily and at higher rates. Consequently, many agencies are risking utilizing volunteers without insuring them because they can't afford the premiums.

Hartford Insurance Company eliminated excess liability insurance for volunteers because:

- -disparity between the low premium and high limits of coverage ($500,000-$1,000,000);
- -complicated adjudication of claims involving multiple companies;
- -increasing number of judgments in excess of coverage.

To compensate for above, sizeable increase of premiums would have been necessary which would have curtailed broad scale acceptance of insurance.

In the case of court referred volunteers, although not significantly adding to the problem, are being excluded from some coverage by some companies. One issue is lack of control over who is allowed to become a court referred volunteer because courts decide. This problem coupled with lack of motivation and control/supervision problems as previously sited, give the insurers justification for not providing court referred volunteers coverage.

Legislative definition of court referred persons as volunteers provided volunteers are also legislative defined, would eliminate court referred volunteer's special problems. Without these definitions, claims and coverages may be denied based on coercive nature of court assigned volunteers and finding that these workers are neither employees or volunteers.

Definition of a Volunteer

The States of Virginia and Florida have enacted legislation in which an attmept to define volunteers were made (see appendix). In both, the focus is to define volunteers for the general purpose of the use of volunteers in conjunction with state programs. California has accomplished this through regulation rather than legislation. To date, California does not have legislative definition of volunteers except as referenced in legislated programs, i.e., pending State Senior Citizens Program, AB 998.

If legislation is pursued in California to define voluntarism, we would suggest:

- -definition be broad based and not only focused on state programs;
- -inclusive of all types of volunteer positions, i.e., those in regular service, occasional service, serving on boards or advisory bodies, and including those selecting volunteerism as

alternative as in students for class credit and court referred volunteers;
- advocates for social change.

Alternatives Open to Consideration

Legislation, content and purpose(s) have been explored in the above. Providing it is passed, it would impact all insurances providing it is as broadly based as recommended. Legislation would also assist in educating private, nonprofit agencies as to requirements.

For Worker's Compensation being totally state regulated, the soundest recommendation would seem to be to make broad based input to the State Fund (State Insurance Commissioner which acts as insurer of last resort) and the Worker's Compensation Board. This would require the joining together of many nonprofit agencies to advocate and impact these entities.

For other types of insurance if not Worker's Compensation the alternatives to be explored are:

- self assurance through pooling resources of a great many agencies;
- advocacy by even a larger group of agencies on a nation-wide scale to impact insurance companies and to negotiate rates;
- exemption, by legislation, of volunteers and/or nonprofit agencies.

Regardless of the alternative(s) selected, more information must be made available to private, nonprofit agencies on the whole insurance issue, liabilities they face, and current options. In turn, agencies must keep their volunteers at all levels adequately informed of the liabilities they are incurring as volunteers.

CODE OF VIRGINIA/TITLE 2.1/CHAPTER 32
(summarized by Ellen Straus in Museum News)

New Legislation

Probably the best legislation in the country on volunteerism is the Virginia State Government Volunteers Act, which became law on July 1 and will affect many volunteers in state museums and historical organizations. The act represents a significant advance for the cause of volunteer professionalism; it authorizes every department of the state and every local agency under the jurisdiction or supervision thereof to develop volunteer programs, provide written guidelines and standards for the use of volunteers and furnish appropriate benefits. Museum volunteers in other states would do well to urge the introduction of similar legislation.

According to the act, every department in the state of Virginia using the services of volunteers shall:

"1. Enlist the services of the Virginia State Office of Volunteerism to assist in the development of volunteer programs;

2. Take such actions as are necessary and appropriate to develop meaningful opportunities for volunteers involved in its programs and to improve public services;

3. Develop written rules governing the recruitment, screening, training, responsibility, utilization and supervision of volunteers;

4. Take such actions as are necessary to ensure that volunteers and paid staff understand their respective duties and responsibilities, their relationship to each other, and their respective roles in fulfilling the objectives of their department;

5. Take such actions as are necessary and appropriate to ensure a receptive climate for citizen volunteers;

6. Provide for the recognition of volunteers who have offered exceptional service to the commonwealth; and

7. Recognize prior volunteer service as partial fulfillment of state employment requirements for training and experience established by the division of personnel."

The act outlines the following volunteer benefits:

"• Meals may be furnished without charge to regular-service volunteers, provided scheduled work assignments extend over an established meal period. Meals may be furnished without charge to occasional-service volunteers at the discretion of the department's executive head.

• Lodging, if available, may be furnished temporarily, at no charge, to regular-service volunteers.

• Transportation reimbursement may be furnished those volunteers whose presence is determined to be necessary to the department. . . Volunteers may utilize state vehicles in the performance of their duties, subject to those rules and regulations governing use of state vehicles by paid staff.

• Liability insurance may be provided by the department utilizing their services both to regular-service and occasional-service volunteers to the same extent as may be provided by the department to its paid staff. Volunteers in state service shall enjoy the protection of the commonwealth's sovereign immunity to the same extent as paid staff."

Finally, the new act encourages the effective use of volunteer professionals:

"Prior to the development of any new programs or presentation of any budget requests . . ., efforts should be made to explore avenues of community involvement through the use of volunteers. Each budget request . . . shall be accompanied by a volunteer impact statement outlining the number and types of services volunteers will provide during the budgetary period and the fiscal savings occasioned by such services."

Volunteer Professionalism
Ellen S. Straus
MUSEUM NEWS
Volume 56, No. 1
September/October 1977

A summary of: "The Day the Volunteers Didn't," by Benjamin DeMott, Psychology Today, March 1978.

The substance of DeMott's article is: Traditionally, volunteerism has been defined as "non-money-compensated efforts by private persons at jobs they believe contribute to the health and well-being of the general society." In America, volunteerism has been seen by the individual as a possibility for self-realization and growth, and by the nation as a defense against the alienation of modern industrial civilization. Yet, volunteerism in America is presently on the decline. Executives of volunteer organizations say that volunteerism has entered a critical period--the volunteer sector is eroding, recruiting is a serious problem and people are after instant gratification.

There are several factors from different sources contributing to this crisis. The usual source of volunteers has been women. The causes for the erosion of this source are epitomized in two statements from the National Organization for Women, 1974 Convention Resolution: un-paid volunteer work is exploitive, and volunteer work should be change- or advocacy-oriented, not service-oriented. Volunteer agencies have questioned the value of volunteer service by untrained amateurs. They realize that goodwill isn't enough to solve complicated social problems and question the seriousness of an amateur's commitment. In the media, the popular self-help movement preaches that self-development comes first and that being responsive to the needs of others doesn't contribute to self-development. The public conception of volunteerism is that it is idealistic, marginal and elitist; that it is incommensurate with the enormous social problems it addresses; and that the relation between volunteering and personal growth is obscure.

DeMott then raises these questions: What happens to commitment if volunteering becomes money-oriented? What is the relation for the individual between giving in a volunteer capacity and psychological growth? What are the possibilities for changes that encourage the growth of volunteerism?

Certain changes at the federal and state levels have been suggested to encourage volunteerism--a change in the Internal Revenue Code so that a person contributing time and skills as a volunteer could compute the value of service rendered and claim it as a tax deduction; funding from the federal and state governments for aid that would bridge the gap between the increasing demands for volunteer services and the slower increases in donations to volunteer organizations; and a federally-funded volunteer program for young people providing full-time national service that would also contribute to their educational growth and finance further formal schooling.

--P.B.

A summary of: "Volunteer Services Suffer as Self-Image of Women Changes," by Steven V. Roberts, *The New York Times*, August 6, 1978.

Roberts reports: The usual source of volunteers-women- is shrinking due to two factors: the change in women's self-image and the return of women to school and work. Women want the "recognition of effort that the pay indicates." Those women who do volunteer are looking for: ways of learning skills that will eventually lead to employment, more responsible jobs and meaningful direct client contact. They prefer work involving social change and advocacy rather than bureaucratic work. For those employing volunteers, this translates into a new purpose for volunteerism--as a way of getting job experience and confidence. Although the traditional source of volunteers is shrinking, there are other sources: retired men and women, students interested in career possibilities, college graduates looking for work experience, and employees of corporations with established programs that encourage volunteerism

--P.B.

Tax Deductions for Volunteer Expenses

Many volunteers are unaware that certain expenses incurred in connection with their volunteer work may be deducted from their federal income tax.

This handout is designed to help the volunteer keep an accurate record of such expenses and provide concise information of what may be tax deductible volunteer connected expenses.

WHAT EXPENSES ARE DEDUCTIBLE?

Your time is priceless...maybe that's why the IRS won't allow tax deductions for time or services that you contribute to a charitable organization!

However, the following expenses *are* deductible:

-Out-of-pocket expenses that you pay in rendering services without compensation (i.e., volunteer services) are considered as contributions. These include:

-amounts you pay for transportation from your home to the place where you volunteer (mileage/busface).

-reasonable payments for necessary meals and lodging while you are away from home rendering donated services to a qualifying organization.

-unreimbursed expenses directly connected with and solely attributable to gratuitous services you may perform for a church or charitable organization.

-reasonable unreimbursed out-of-pocket expenses spent for under privileged juveniles to attend athletic events, movies, dinners, etc., by an adult selected by a qualifying organization whose goal is to reduce juvenile delinquency (through individual quidance in sound character development). These programs can include VIP, Big Brothers, tutoring programs, etc.

-automobile expenses: you may deduct unreimbursed out-of-pocket expense directly attributable to services you render to a charitable organization, such as expenditures for gas, oil, etc., in operation of your car.

- or -

-instead of actual expenses, you may use a standard rate of 6¢ per mile to determine your contribution. Under this method, parking fees are deductible in addition to the 6¢ per mile.

-per diem allowance: if you perform volunteer services for a charitable organization and receive a per diem allowance to cover reasonable travel expenses (lodging, meals, fares, etc.) while away from home, you may deduct the difference between your expenses and the per diem IF the expenses are greater.

-cost of uniforms as well as their upkeep...if the uniform has no general utility and is required to be worn while volunteering.

-dues, fees or assessments that you pay to qualified organizations...if they exceed the monetary value of benefits and privileges received in return.

-maintaining a student in your home: you may deduct up to $50 per school month of the amount you pay to maintain in your home a full-time student (12th grade or under), who is NOT a dependent or relative. You must have a written aggreement with a qualified organization stating that the student is staying with you to provide educational opportunities for him or her.

WHAT EXPENSES ARE NOT DEDUCTIBLE?

You may not deduct expenses for the following:

- expenses incurred to attend a church or group convention solely as a member of that church or group rather than as a duly chosen representative or delegate...that is, if you decide to go for your own information.
- volunteer's own expenses when attending athletic events, movies, dinners, etc. with underprivileged juvenile.
- automobile expenses: you may not deduct a pro rata portion of general repair and maintenance expenses.
- per diem allowance: you may not deduct any expenses for which you have been reimbursed by per diem allownace or as expense monies.
- dues, fees or assessments paid to veterans organizations, lodges, fraternal organizations or country clubs are not deductible.
- if you receive any compensation or reimbursement for a student's maintenance you will not be allowed a deduction for any part of your cost of maintaining him in your home.

If you have any further questions about deductible expenses, call your IRS office.

Information is taken from:

INCOME TAX DEDUCTIONS FOR CONTRIBUTIONS

Publication #526
Published by: Department of Treasury
Internal Revenue Service
1974

Information published by:

COVE...Council on Volunteers for Erie County
110 West 10th St., Erie, Pa. 16501
Phone: (814) 456-6248

To keep current, check revisions with IRS or with a tax consultant.

RESOURCES

American Association for State and Local History (AASLH)
1400 Eighth Avenue South
Nashville, TN 37203

Concerned with volunteers in historical organizations. Has training seminars for volunteer administrators in interpretation. Brochure available. (fee)

Association of Volunteer Bureaus
801 North Fairfax Street
Alexandria, VA 22314

Associated with the National United Fund Administration; special expertise in using volunteer fundraisers. Also does advocacy and advising on volunteer management and training. Publishes journal (see bibliography).

The Commission on Voluntary Service and Action
475 Riverside Drive
New York, NY 10027

Council of National Organizations for Adult Education
810- 18th Street, N.W.
Washington, D.C. 20006

Publishes Probing Volunteer-Staff Relations, a kit for organization self-inventory. With adaptation, it could be useful in analyzing the existing condition between staff and volunteers.

National Alliance for Volunteerism
Ellsworth Culver, Executive Director
Boulder, CO 80302

National Center for Voluntary Action
1785 Massachusetts Avenue, N.W.
Washington, D.C. 20036

Publishes journal (see bibliography). Seeks to stimulate and strengthen volunteer services and voluntary organizations with training and development services.

Volunteer Committees of Art Museums (VCAM)
Contact: Mary Naquin
c/o Baltimore Museum of Art
Art Museum Drive
Baltimore, MD 21218

An organization of and for art museum volunteers. Publishes conference proceedings.

National Information Center on Volunteerism (NICOV)
Box 4179
Boulder, CO 80302

Publishes evaluation system called "Basic Feedback Systems for Volunteer Programs."

Smithsonian Institution
Office of Museum Programs
Washington, D.C. 20560

Offers workshops on volunteer training/management. Brochure available. (no fee).

PERIODICALS

Bay, Ann. "Getting Decent Docents." Museum News, April 1974, pp. 25-29.

Observations of docent programs in 24 museums. Divided into sections on volunteer docents, paid docents, college students as interpreters, community interns and high school students as interpreters. Under volunteer docents she discusses recruitment ideas and the training typical to most museums. How to recruit high school and college students.

"Do We Really Need Volunteers?" Redbook, September 1975.

Duff, James H. "An Untapped Resource." Museum News, May 1972, pp. 25-27.

Description of the teenage (12-16 year olds) program at the Museum of the Hudson Highlands, Cornwall-on-Hudson, N.Y., a natural history museum. Volunteer teenagers help out with exhibit installation, custodial duties, care for animals and serve as guides in the museum and teaching aides in the schools.

Ferdon, Edwin N. and Cappelluzo, Emma M. "A Double Duty Docent Program." Museum News, March 1966, p. 20.

Reviews the Arizona State Museum Program.

Flanders, N. and Flanders, M. "Evaluating Docent Performance." Curator, No. 3 (1976).

This article is concerned with evaluating museum programs by analyzing tours, teaching evaluation procedures so docents can study their own tours, and using evaluation constructively in the pre-service and in-service training of docents. The first part provides a general discussion of evaluation, emphasizing ways to reduce the threat docents may perceive by making evaluation part of a museumwide program. Part two is much more technical and shows how interaction analysis (a system of coding statements as people talk, and arranging these code marks for interpretation) is used to analyze segments of sample tour. Emphasis is placed on how communication patterns change as a tour progresses. Highly recommended reading, especially part one. Includes a more extensive bibliography on interaction analysis.

Hall, Nancy Johnston and McGray, Karla. *How to Make a Museum Volunteer Out of Anyone*. Volunteer Administration, X, No. 3 (Fall 1977).

Henderson, A.K. "You Can be a Docent." *Retired Living*, December 1974.

Thinking about docents as an audience, docent programs as a service to this audience.

Korff, Alice G. "Museum Volunteers and the VCAM." *Museum News*, February 1968.

The VCAM-Volunteer Committees of Art Museums is an independent organization (see also *Museum*, XXIX, No. 1, 1977) working to define issues and encourage volunteer professional growth for its members.

Museum, XXIX, No. 1, 1977.

Quarterly review published by UNESCO/ICOM (contact AAM for subscription information.

An issue devoted to "Museums and their friends"--volunteer organizations of all kinds. Apparently the United States is the one country using volunteers primarily for education. After making a case for the above statement, the articles tend to gloss over the important issues.

Museum News, 56, September/October 1977.

An issue featuring museum volunteerism. Issues, bylaws for volunteer groups, professionalism, using the individual's expertise to build an entirely new volunteer program.

"Museums for Fun and Learning--St. Paul Public Schools Volunteer Services Program and Minnesota Museum of Art." *American Education*, May 1971.

Another report on the Community Resource Program in Minneapolis/St. Paul.

Payson, Huldah Smith and Korff, Alice G. "Volunteers--Priceless Personnel for the Small Museum." *Museum News*, February 1967, p. 18.

Professional Volunteers: Equal Work for Unequal Pay." *Harper's Bazaar*, July 1972.

The global issues: feminism, volunteerism as a potential threat to paid positions, the responsiblities of the institution.

Reed, Betty Jane. "Establishing a Community Resource Volunteer Program." Museum News, May 1972, pp. 20-24.

Reibel, Daniel B. "Getting Young People Involved. Teenage Docents at Old Economy." Historic Preservation, April 1972, pp. 16-21.

_____. "The Volunteer: Nuisance or Savior." Museum News, March 1971, p.28.

> How and how not to use volunteers. Ask present docents if they would like to take part in other duties besides giving tours; for instance, minor restoration of the collection, research or educational programs. Ideas for finding a new source of volunteers, teenagers and men. Consideration of rewards for volunteers: formal recognition of their work, allowing them to learn a craft, free admission and discounts at the museum. On the issue of what a volunteer should not do, Reibel says if the professional staff cannot evaluate the volunteer's work, the work should be stopped. Volunteers can be a valuable source of labor in a small understaffed museum. Reibel's general position is that volunteers are desirable only if paid professionals are not a possibility.

Stagg, Brian L. "Getting Young People Involved." Historic Preservation, Spring 1972.

Stevenson, Helen Hartinger. "Help for the Museum: Volunteers." Museum News, May 1966, p. 34.

Swauger, James L. "Is There Life After Retirement?" Museum News, November 1973, pp. 31-33.

Voluntary Action Leadership

Quarterly journal published by National Center for Voluntary Action.

Subscription information. 1 year: $8.00 prepaid, $9.00 if billed.
Contact: Voluntary Action Leadership
NCVA
1214 16th St., N.W.
Washington, D.C. 20036

Volunteer Administration

Quarterly publication of the Association of Voluntary Action Scholars and Association of Volunteer Bureaus. Practical and philosophical issues, research. Thought provoking, useful.

Subscription information.
Contact: Volunteer Administration
Box G-55, Boston College
Chestnut Hill, MA 02167

"Volunteerism": National Council of Jewish Women, October/December 1977.

The entire edition deals with the growth of volunteerism in America, its reasons and directions. Also an interesting article about using your volunteer experience when entering the job market. Raises this point--do you have to put in volunteer time before getting a good job?

"'Wanted' An Agressive Breed of Volunteers." Design. July 1972.

Williams, Patterson. "Teaching or Touring?" Roundtable Reports. Summer 1976.

This article deals with the difference between museum teachers, professionals who are equipped to teach, as opposed to tour guides. The distinction is made between professional educators and volunteers. Roundtable Reports is available by subscription. Published quarterly @ $10 per year. Write to: Nancy Welch Murphy, Office of Museum Programs, Smithsonian Institution, Washington, D.C. 20560.

BOOKS AND PAMPHLETS

Alderson, W.T. and Low, S.P. Interpretation of Historic Sites. American Association for State and Local History, Nashville, TN 1976.

Contains "docent do's and docent don'ts." helpful tips for interpreters. Available for purchase through National Trust for Historic Preservation.

Newsom, Barbara Y. and Silver, Adele Z., eds. The Art Museum As Educator. Berkeley, CA: The University of California Press, 1978.

Start any project by reading this book.

The Basic Bookshelf, Fall/Winter 1977.

A catalog of publications available from the National Center for Voluntary Action. (annotated) If you are building a reference library (the one shelf variety) on volunteer issues, you should know about the publications distributed through the NCVA. Contact: VOLUNTEER, Division of NCVA/NICOV, P.O. Box 1807, Boulder, CO 80302.

Bradshaw, Mary Claire. "Volunteer Docent Programs: A Pragmatic Approach to Museum Interpretation, Technical Leaflet #65," History News, Vol. 28, No. 8, August 1973.

Includes sections on: Planning the Program, Finding Volunteers, Standards, Training and Organizing Docent Groups. Bradshaw says that it is necessary to define the docent's role; the volunteer should be interviewed and the initial work considered "provisional" for a short interval. Docents should have: "a willingness to take criticism, desire to learn, reasonable appearance, satisfactory speaking voice, punctuality and dependability." The museum should have "scheduling efficiency, adequate resource materials, communication, advance notice of training programs and exhibits." Bradshaw's view seems to be that structure and definition will solve most of your problems. A good basic reference. History News is the journal of the American Association for State and Local History.

Can You Use a Volunteer? The Planning and Operation of a Successful Volunteer Program. (1971) Volunteer Bureau of Pasadena, 118 South Oak Knoll Avenue, Pasadena, CA 91101.

Carter, Barbara. *Organizing School Volunteer Programs*. New York: Citation Press, 1974.

Flanders, N.A. *Analyzing Teaching Behavior*. Reading, MA: Addison-Wesley, 1970.

This book describes the procedures and limitations of interaction analysis as applied to teaching. It would be useful in docent training because it includes procedures for practice, for the adaptation of categories to special purposes, and multiple coding of single events.

Flanders, N.A., et. al. *Interaction Analysis: A Minicourse*. Paul S. Amidon & Associates, 4329 Nicollet Avenue S., Minneapolis, MN 55409.

This is a media package containing training manuals, cassette tapes, and observation forms. It was designed for teacher training, but could be adapted for docent training. Contact publisher for free descriptive flyer.

Guidelines for Interviewers (1971). Voluntary Action Center of New York City, Mayor's Office for Volunteers, 250 Broadway, New York, NY 10007. (One copy sent free upon request.)

Margolis, Frederick H. *Training by Objectives: A Participant-Oriented Approach*. Cambridge: McBer and Co., 1970.

Morine, H. and Morine, G. *Discovery: A Challenge to Teachers*. Englewood Cliffs, N.J.: Prentice-Hall, 1973.

Includes exercises for concept attainment and concept development which have direct application for questioning strategies that could apply to docent tours.

Naylor, Harriet H. *Volunteers Today*. Dryden Associates, P.O. Box 363, Dryden, NY 13053.

Pell, Arthur R. *Recruiting, Training and Motivating Volunteer Workers*. Pilot Books, 347 Fifth Avenue, New York, NY 10016, 1972.

Pitman-Gelles, Bonnie. *Watermelon*. New Orleans: Museum of Art, 1972.

A weighty example of a docent handbook. It contains some excellent examples of interactive devices and techniques. Available for sale from New Orleans Museum of Art, Lelong Avenue, City Park, P.O. Box 19123, New Orleans, LA 70179.

Probing Volunteer-Staff Relations (1964). Council of National Organizations for Adult Education (Betsy H. Angert), 810-18th Street, N.W., Washington, D.C. 20006.

"Recruiting Low-Income Volunteers: Experiences of Five Voluntary Action Centers." National Center for Voluntary Action.

Most useful section is under recruitment techniques: recruitment suggestions made by project evaluators. (Price $.50)

Recruiting Volunteers: Views, Techniques and Comments. The National Center for Voluntary Action, 1785 Massachusetts Avenue, N.W., Washington, D.C. 20036.

Worthwhile. Outlines what questions should be asked and goals to be defined before recruitment takes place. Sections include: Program Goals and Volunteer Roses, Why Volunteers? Handling the Response, Recruiting Volunteers of Various Ages and Backgrounds and Recruitment Timing and Times to Volunteer. The second part, Recruiting Techniques, lists ways to get volunteers.(Price $1.00)

Smith, David Horton. Evaluating Voluntary Action. Center for a Voluntary Society, 1507 M. Street, N.W., Washington, D.C. 20052, 1972.

Stufflebeam, D.L. "Evaluating as Enlightenment for Decisionmaking." Paper presented at Working Conference on Assessment Theory, Sarasota, FL, 1968.

Obtainable through Ohio State University Evaluation Center, Columbus,OH.

Training Student Volunteers. National Student Volunteer Program, ACTION, 806 Connecticut Avenue, N.W., Washington, D.C. 20525. (Free)

Volunteer Coordinator Guide, 1973 ed., University of Oregon, Larry Neal, Center of Leisure Studies, 1587 Agate Street, Eugene, OR 97403.

Wilson, Marlene. The Effective Management of Volunteer Programs. Volunteer Management Association, Boulder, CO, 1976.

A practical rather than theoretical guide concerning basic philosophies about people and how to treat them in a way that encourages growth and self-renewal in the individual and organization.

You and Your Volunteers: A Partnership that Works, 1972 ed. State Department of Social Services, Carolyn F. Viall, 1450 Western Avenue, Albany, NY 12203. (Free)

INFORMATION ABOUT INFORMATION

An Annotated Bibliography

Center for Museum Education
George Washington University
Washington, D.C. 20052
April 1978

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Bradshaw, Mary Claire. "Volunteer Docent Programs: A Pragmatic Approach to Museum Interpretation, Technical Leaflet 65," History News, Vol. 28, No. 8, August 1973. (8pp.) 28.A.1

Traditional approach to planning a volunteer program, including recruitment, setting of standards, training and docent organizations. Author's special interest is in historic sites.

Write directly to American Association for State and Local History, 1400 Eighth Avenue South, Nashville, TN 37202.

Museum Education Roundtable. "Museum Education Roundtable Docent Training Outline," Roundtable Reports (August 1973). (3pp.) 28.A.2

This specific and comprehensive outline could be useful in planning and evaluating a docent training program. (See 28.A.3)

Roundtable Reports is a quarterly publication of the Museum Education Roundtable (MER), a Washington, D.C. based organization of persons concerned about museum education. MER welcomes national memberships.

Museum Education Roundtable. "Docent Training Programs." Roundtable Reports (August 1973). (6pp.) 28.A.3

Much of this issue of RTR is devoted to summary of five workshops held by Museum Education Roundtable on topic of training volunteer docents. Areas reported on include content of sessions, communication skills and attitudes toward unpaid professionals. The workshop's discussion outline is included (See 28.A.2).

Robinson, M.M. "List of Services Which Docents Can Provide--Other Than Tours." May 1975. (1pp.) 28.A.4

A list of 20 tasks performed by volunteer docents at the Arizona-Sonora Desert Museum, ranging from mimeographing to advising visitors on injured birds and animals. You may want to compile such a list for your own volunteers.

Taylor, Barbara and Wasilewski, March. "Volunteers and Docents." n.p., 1975. (22pp.) 28.A.5

Thoughful packet of information prepared by graduate students in museum education as part of course requirements. Raises questions to consider in volunteer recruitment, training, evaluation, program coordination, the scheduling of tours; includes, sample forms for application, volunteer-agency agreement, evaluation and bibliography.

Coleson, Kelly. "So You Want a Good Volunteer Force." n.p., 1975. (2pp.) 28.A.6

Chatty but thoughtful presentation of tips useful to the development of a volunteer force. All in all a very sane, sensible and useful piece of goods.

Department of Education, Brooks Memorial Art Gallery. "Docent Program." n.p., n.d. (7pp.) 28.A.7

Paperwork for docent program including introductory letter, application, detailed training schedule, summative evaluation form, museum-volunteer agreement form.

Tatum, Gordon, Jr. "Guides Learning Language of Art at Gallery," The Mobile Press Register, 11 February 1973. (3pp.) 28.A.8

News article of local museum's training program for gallery guides which includes a deposit of $35.00 paid upon enrollment. When the docent has fulfilled the coursework and gallery tour requirements, the money is refunded. Balance of training is not out of ordinary.

Ordman, Evelyn, Chairman. "Guidelines for the Use of Volunteers in the Montgomery County Public Schools." Rockville, MD: Montgomery County Public Schools, 31 March 1970. (39pp.) 28.A.9

This report was prepared by a committee appointed to study guidelines for the use of volunteers in the Montgomery County, MD, Public School System. Well-organized, but directed toward a school's application, the booklet enumerates issues to consider and includes resource sample forms and newsletters.

Jones, Lois Swan. "Volunteer-Guides and Classroom Teachers In School-Visitation Programs in European North American Art Museums," Studies in Art Education Vol. 18, No. 3 (1977). (12pp.) 28.A.10

Filled with statistical jargon and graphs from a variety of sources. The author concludes that art museums questioned evolved their programs as though in a vacuum and continued their programs as long as they seemed effective. Author is an assistant professor of art, North Texas State University, Denton, TX. Good bibliography.

Straus, Ellen Sulzberger. "The Volunteer Professional." n.p., ca. 1974. (4pp.) 28.A.11

From her position as National Chairperson, Call for Action, Inc., Straus takes an advocacy posture in behalf of volunteer professional who should be hired, fired, trained, instructed, appreciated and supervised--everything except paid--exactly like any other worker. The key word is contracts and Straus includes model agreement for the agency and volunteers plus thoughts on reaching an agreement and looking beyond the agreement for instance to tax deductions for services rendered. 28.A.11 (cont.)

Call for Action, Inc. is located at 888 Seventh Avenue, NY, NY 10019. (See also 28.A.34 and 28.A.70.)

Loercher, Diana. "Volunteerism--For and Against." The Christian Science Monitor, 11 June 1973. (2pp. reduced.) 28.A.12

Ellen S. Straus (see 28.A.11) sees volunteers as vigilantes necessary to the well-being of our society. NOW charges volunteerism has kept women economically dependent and emotionally obedient to the image of servility and dependency as the hallmarks of womanhood. (See 28.A.53 for another discussion of the philosophy of volunteerism.)

Hilburn, Pat. Volunteer, National Portrait Gallery, Washington, D.C. Interviewed by Jane North, 8 April 1975. (3pp.) 28.A.13

Fascinating and all too brief introduction to a volunteer of 2 1/2 years who shares with us her impressions and attitudes of volunteerism, her motivation and satisfaction of volunteering, the role of the museum vis a vis volunteers.

White, Judy. "Summary of Volunteer Training Programs in Several Museums." n.p., ca. 1975. (23pp.) 28.A.14

A survey of how volunteers are trained and employed at 10 museums and zoos across the U.S.A. Information gathered by observation and interview.

Mint Museum of Art. "Outline of Docent Programs." n.p., n.d. (12pp.) 28.A.15

Really a statement of program components, structure and order without substantive information on the instruction. Also includes copy of art history slide-lecture "Looking at a Painting." No indication of audience for whom it is intended.

"Bath Marine Museum, Apprenticeship and Internship Programs." n.p., 13 August 1976. (3pp.) 28.A.16

Information sheet about dual role played by apprentices in boatbuilding at this museum. An apprenticeship lasts 2 years; no tuition is charged and no salary paid, a veritable volunteer. In addition to boatbuilding, the apprentice serves as interpreter, supervises the interns and conducts full-day seminars for high school groups.

Questions for a Docent Training Workshop. n.p., n.d. (3pp.) 28.A.17

Four thoughtful statements on docent recruitment, and training, tour scheduling and evaluation with suggested discussion questions and three true docent-problems. Useful for docent-related workshop or to help direct your own thinking about docent-related issues. 28.A.17 (cont.)

Nelson, Judy. "Schedule and Description of Training Program." n.p., 10 September 1975. (3pp., 1pp. schedule) 28.A.18

Just what the title implies of volunteer training held in advance of opening of Capital Children's Museums, Washington, D.C. Not of wide interest.

Miscellaneous applications and evaluation forms, n.p., n.d. (20pp.) 28.A.19

Sample forms from High, Greenville County, Corcoran, Cleveland and New Orleans Museums of Art.

"Tax Deductions for Volunteer Expenses." n.p., n.d. (3pp.) 28.A.20

A handy handout citing deductible and non-deductible expenses incurred in connection with volunteer work. Information taken from Income Tax Deductions for Contributions, Publication #526, Department of Treasury, IRS, 1974.

Wilson, Marlene. The Effective Management of Volunteer Programs. Boulder, CO: Volunteer Management Associates, 1976. (197pp.) 28.A.21

Book examines changes in area of volunteering, outlines functions of a manager of volunteers, and discusses motivation, interview and placement of volunteers. Very useful in looking at business of managing volunteers.

Order from: Volunteer Management Associates, 279 S. Cedar Brook Road, Boulder, CO 80302. Cost: $4.95 plus 55¢ postage. No billing for orders of less than 3 books.

Community Resource Volunteers (CRV). "How to Initiate and Administer a Community Resource Volunteer Program." Minneapolis: Minneapolis Public Schools, 1974. (102pp.) 28.A.22

In 1965, the CRV was begun, a program which among other things maintains dossiers on parents and non-parents with a special skill or interest who are willing to serve as classroom resource personnel. Booklet provides additional clues to management of volunteers. Packet also includes Teachers Guidelines for Using CRV; Guidelines for CRV; Community Involvement Works!; Annual Report for CRV; newsletter.

Order from Menneapolis Public Schools, Administration Building, 807 N.E. Broadway, Minneapolis, MN, 55413. Cost $5.00 prepaid. See also: Reed, Betty Jane. "Establishing a Community Resource Volunteer Program," Museum News (May 1977): 20-24.

Hoaglund, Mary L. "Community Resource Pool (CRP), Mid-Year Evaluation Summary, 1975-76." Edina, MN: Edina Public Schools, February 1976. (50pp.) 28.A.23

As neighbors of Minneapolis, Edina volunteers were aware of CRV (See 28.A.22) and in 1972 instituted CRP, a volunteer-run organization designed to provide volunteer services to Edina schools. This evaluation offers a lucid presentation of CRP with program descriptions supported by numbers and statistics to indicate volunteer hours involved. Includes theme units with available resources, people and places. Bylaws and organizational chart and evaluation sheets included.

Karn, John and Stelmah, Lynn. "Volunteers and Docents." n.p., April 1977. (40pp.) 28.A.24

Packet prepared by graduate students in museum education includes tips on needs assessment, goal setting, recruitment, training, evaluation, program organization--each issue presented with questions and considerations, program samples with contact names and bibliography.

von Hoffman, Nicholas. "Government Volunteers: Are They Worth It?"Washington Post, 28 March 1977. (1pp. reduced.) 28.A.25

Von Hoffman verbally chastizes the U.S. Government for prepetuating the use of government employees as volunteers, as with Peace Corps and VISTA. He feels that instead government should create an environment that fosters self-help and that experience is the only credential which should count in selecting volunteers to assist with that self-help. The "...idea of paid volunteers is really too ungainly a contradiction."

A report of ongoing changes in docent programming at Museum of Fine Arts, Boston. 28.A.26

To be available September 1978.

Flanders, Mary P. and Flanders, Ned A. "Evaluating Docent Performance." Curator 19/3 (1976). (14pp.) 28.A.27

Two-part article which provides general discussion of evaluation with ways to reduce the threat of being evaluated and demonstrates the usefulness of evaluation to preservice training. Also analyzes tours by degree of interaction between docent and visitor: short bibliography.

Order from Curator Quarterly, American Museum of Natural History, Central Park West at 79th Street, NYC 10024. Cost: $3.00.

Gilman, Benjamin Ives. "The Museum Docent," Roundtable Reports, Spring 1977. (6pp.) 28.A.28

Abridged article from Chapter 5, Museum Ideals of Purpose and Method, 1918. This particular chapter was first published in the proceedings of the American Association of Museums, Vol. IX, 1915. Written with art museums in mind, Gilman's comparisons of school and museum education and his articulation of concerns that we view as contemporary are surprising. 28.A.28 (cont.)

Roundtable Reports is the quarterly publication of Museum Education Roundtable, a Washington-based organization of individuals concerned about museum education. Membership information and individual issues of RTR ($2.50 each) can be obtained by writing to the Center.

Berrill, Anne and Fertig, Barbara C. "The Museum Volunteer," The Art Museum As Educator. Berkeley, CA: University of California Press, 1977. (14pp.) 28.A.29

This introduction to program descriptions of volunteer programs helps to put in perspective the volunteer's place in the museum, in terms of dollar value, staff time, variety of service, benefits of service, accountability and evaluation. Is the amount of staff time spent on recruiting, training, evaluating and supporting of volunteers cost efficient? Or would the money and energies be more effectively directed elsewhere? Chapter 5 in The Art Museum As Educator reports on six museums and their use of volunteers.

The Art Museum As Educator can be ordered from the University of California Press, 2223 Fulton Street, Berkeley, CA 94720. Cost: Cloth ed. @ $30.00 each; Paper ed. @$14.95.

Stagg, Brian L. "Getting Young People Involved," Historic Preservation, Spring 1972. (3pp.) 28.A.30

Short article advocating cooperation between young and old volunteers in making historic preservation meaningful for all ages. A small historic site in Rugby, Tennessee supports Stagg's case.

Office of Museum Programs, Smithsonian Institution. "Adolescents in the Museum." Washington, D.C.: Smithsonian Institution, 5 November 1973. (3pp.) 28.A.31

Summary of responses to 7 questions about museum tours for adolescents. Areas of discussion include lessening teenage self-conciousness, dealing with student trouble makers and devising successful tours for adolescents. A practical question and answer session designed to help docents improve their rapport with teenagers.

Hagerty, John. "University of Kansas Museum of Art-In a Spirit of Synthesis." Draft of research paper for Council on Museums and Education in the Visual Arts, 1975. (13pp.) 28.A.32

Discussion of campaign by the University of Kansas Museum of Art to stimulate volunteer support. Techniques used include increased publicity and community involvement and a cooperative effort with University's drama, music and continuing education departments.

Western Association of Art Museums. "Museum Educators Travel." 28.A.33
WAAM Newsletter, (Winter 1976). (1pp.)

Two tantalizing items: 1)radical proposal to provide travel opportunities to paid and volunteer museum education personnel to visit and study education department of WAAM institutions; 2) refunded by NEA, 30 visiting specialists in a variety of museum areas will be made available to member museums. 60% of visiting specialist's expenses are borne by WAAM.

Straus, Ellen S. "The Volunteer Professional, What You Need To Know." NYC: Straus Communications, Inc., 1972. (15pp.) 28.A.34

More from Call for Action, Inc. Really a restatement in tidy booklet form supporting idea of treating volunteers exactly like paid professionals. See also 28.A.11 and 28.A.70.

Write to: Call for Action, 888 Seventh Avenue, NY, NY 10019.
Cost: $1.00.

"Docent Programs." 31 July no year. (2pp.) 28.A.35

Notes in outline form of unidentified discussion of volunteerism issues. Includes some cryptic references to visits to D.C. museums, but also cites clues to a volunteer's motivation, recruitment sources and criteria and suggested training approaches. You could develop your own outline by brainstorming with fellow museum educators in your region.

Department of Education, Los Angeles County Museum of Art. "Museum Services Council." n.p., n.d. (2pp.) 28.A.36

Uncluttered, in striking orange with purple, this volunteer recruitment flyer does provide all necessary data, but is a little severe, not as inviting or welcoming as 28.A.37 or 28.A.39.

Volunteer Office, Museum of Science. "Visitor Guides." n.p., n.d. (3pp.) 28.A.37

Attractive brochure in ochre with red orange describing the museum's volunteer guides program in detail, citing qualifications, expectations and benefits to volunteers. Good model of recruitment brochure.

Department of Education, Loch Haven Art Center, Inc. "Volunteer." n.p., n.d. (1pp.) 28.A.38

Another neat, enticing recruitment brochure with "volunteer" sprouting hands raised to offer service. Lists areas of alternative service. Includes application form.

Department of Education, Akron Art Institute. "How to get a young man to fall in love with you." n.p., n.d. (2pp.) 28.A.39

Enchanting docent recruitment brochure.

Haynes, Holly. L.; Krulick, Janet; Norin, Bonnie; and Piatt, Margaret. "Volunteer/Docent Packet 1978." (73pp.) 28.A.40

Enlargement and update of packets on volunteers and docents prepared 1976 and 1977 by other graduate students in museum education (See 28.A.5 and 28.A.24). Categories include: Needs Assessment and Goal Setting; Recruitment; Selection; Training; Evaluation; and Program Ogranization. Within each topic are included the following sort of information: questions and considerations; program examples; sample forms; and bibliography. A handy and sensible collection of things to consider when administering a volunteer docent program.

Reibel, Daniel B. "The Use of Volunteers in Museums and Historical Societies." Curator 17/1 (1974). (11pp.) 28.A.41

Another professional's thoughts on volunteers--definition, recruitment training, organization, discrimination and compensation, museum-volunteer relationship. Reibel concludes that dealing with volunteers depends on several factors, none of them related to the amount or type of work desired, but rather on attitudes, governing bodies and past experience with volunteers. Includes 15-item bibliography. Author is Curator of Old Economy Village, Ambridge, PA.

Coleson, Kelly and Kingsbury, Sally. "Evaluation for Special Considerations Workshop." n.p., Spring 1975. (4pp.) 28.A.42

Graduate students in museum education conducted workshops for docents at Hirshhorn Museum and Sculpture Garden, Washington, D.C., on special considerations when touring school age visitors, like discipline and age-group characteristics. Their evaluation form directs docent participants to focus on why they attended, what they can use to apply and what questions were raised; provides good clues to problems to anticipate and consider in advance of dealing with them on a tour. Some intriguing, but realistic, problem-solving situations presented. Thoughtful and useful addition to your files.

ACTION, National Student Volunteer Program. Training Student Volunteers. Washington, D.C.: ACTION, n.d. (120pp.) 28.A.43

Manual offers a 7-step design scheme for individuals responsible for planning systematic training events. Examples cited are community-help related (drugs, crisis prevention), but the manual is eminently sensible in identifying and dealing with components of planning training workshops. Chapter topics: Needs Assessment and Establishing Objectives; Putting It All Together; Techniques: How to Use Them; Evaluation; What Is Training?; Who Is a Trainer?; Bibliography. Center can photocopy a chapter or two or the complete manual.

Frankel, Diane, Coordinator. "Docent Forum: A Market Place of Ideas." n.p., 25 April 1977. (33pp.) 28.A.44

Docents from museums in northern California meet annually to share ideas and experiences. Unlike previous single-issue forums, the 1977 meeting responded to evaluations of former participants and provided docents with maximum opportunities to meet docents from other institutions and disciplines. Topics covered are: adult tours, school tours, approaches to docent training, in-school programs, effectiveness of the museum as a learning environment, evolution, administration and outreach. A bibliography is included.

Write directly to Diane Frankel, Education Department, San Francisco Museum of Modern Art, Van Ness and McAllister Streets, San Francisco, CA 94102. Cost: $1.00. Make checks payable to Docent Forum.

Smithsonian Torch, January 1978. (8pp. oversized.) 28.A.45

This issue of the museum's monthly newspaper is one way in which the Smithsonian Institution demonstrates its gratitude to its volunteers. Computed at a GS-5 level, volunteer service at SI amounted to nearly $2 million for 1977. In this issue, Ken Yellis, Associate Curator of Education, National Portrait Gallery, and three education volunteer docents discuss their work with children at NPG.

Department of Education, Arizona-Sonora Desert Museum. "Docent Information Sheets." n.p., October 1975 and 1976. (10pp.) 28.A.46

Tour ideas for specific animal areas in museum including factual data and inquiry questioning suggestions. Also "Docent Notes," March 1977, a miscellaneous collection of factual data; updating on the collection (mountain lion kittens have had their claws clipped); news of docent doings (Congratulations to Docent Mrs. Ronstadt whose daughter Linda just won her second Grammy award); and docent assignment schedule.

Naquin, Mrs. Howard, Chairman. "Eighth Conference of the Volunteer Committees of Art Museums of the United States and Canada." Baltimore, MD, 30, 31 October 1973 and 1 November 1973. (117pp.) 28.A.47

Begun in 1952, the VCAM was founded to discuss "...the value of Women's Committees and their usefulness to their respective museums and to share...ideas regarding fund raising, membership drives, educational programs..." 69 Museums were represented at this conference, the theme of which was "The Changing Role of Volunteers," and topics included new audiences in urban outreach, the use and misuse of volunteers, volunteer committee structures, volunteer staff-trustee relationships and volunteers art museum and education for children. Keynote speakers were Ms. Nancy Hanks, Mrs. William Rogers, and Dr. W. Homer Turner. This report summarizes the conference's findings.

Order from Mrs. Mary M. Naquin, Volunteer Committee of Art Museums, Baltimore Museum of Art, Baltimore, MD 21218. 28.A.47 (cont.)

Cook, Linda and McGuire, Anne. "Concepts in Organizing a Museum Volunteer Program." n.p., 15 December 1977. (20pp.) 28.A.48

Research paper for course in museum practices. Conclusions are: 1) the nature of volunteerism is changing and museums must reorient themselves to a different volunteer; 2) the museum must justify the expense to the museum in terms of supervision and funds; 3) the role of the volunteer coordinator is of primary importance to the success of the volunteer program.

(Cannot be photocopied.)

Kipps, Harriet, Editor. "Clearinghouse Green Sheets: National Membership and Resource Organizations" and "Cultural Enrichment Resource Groups." Washington, D.C." National Center for Voluntary Action, March 1974. (17pp. and 5 pp.) 28.A.49

The first is a directory-like collection of resource organizations across the country that develop and promote the usefulness of volunteers, including organizational objectives, membership information and services, plus a comprehensive list of related publications on volunteers and volunteer training. The second green sheet includes resource groups and bibliography concerned with performing arts.

These are publications of the National Center for Voluntary Action (NCVA), 1785 Massachusetts Avenue, N.W., Washington, DC, 20036. (202) 467-5560. (See also 28.A.51.)

Naylor, Harriet H. *Volunteers Today, Finding-Training and Working With Them*. Dryden, NY: Dryden Associates, ca. 1976. (not known.) 28.A.50

The Center staff *has not* reviewed this publication, but, judging from the press notices on file, believes it could be a useful reference on volunteers. At the time of publication, the author was Director of Educational Development, National Center for Voluntary Action.

Direct inquiries to: Dryden Associates, Box 363, Dryden, NY 13503. Cost: $3.95.

Voluntary Action Leadership (Winter 1978). (46pp.) 28.A.51

Quarterly publication of National Center for Voluntary Action, an agency created in 1970 as a national advocate and a primary technical assistance and training resource for local programs that rely on volunteers to carry out their programs. There are over 300 affiliated voluntary action centers throughout the country. This winter issue considers corporate community volunteers, volunteer fairs and the existing power and unfulfilled potential of religious groups, within and without the church and synagogue. 28.A.51 (cont.)

Also available: Flyer of inexpensive reprints, brochures on volunteer-related issues, and a free 36-page catalog of 75 titles related to volunteerism.

Subscriptions available through: Voluntary Action Leadership, 1214-16th Street, N.W., Washington, D.C. 20036.

Fertig, Barbara C. "National Collection of Fine Arts-Volunteers and Docents." Draft of research paper for Council on Museums and Education in the Visual Arts, 1975. (28pp.) 28.A.52

Report covers brief history of NCFA, describes the role and training of docents, and hints that director is applying his background in education to the museum, encouraging a redefinition of the role of the director.

De Mott, Benjamin. "The Day the Volunteers Didn't" Psychology Today, March 1978, pp. 23-132. (4pp.) 28.A.53

Review of subtle dangers to continuation of volunteerism in U.S.A.

"Management of Volunteer Programs." n.p., February 1978. (2pp. reduced.) 28.A.54

Brochure of 11th annual national workshop designed to involve administrators of volunteers in creative learning experiences. Useful listing of individuals interested and/or experienced in working with volunteers in wide variety of settings.

Sponsored by Bureau of Conferences and Institute, University of Colorado, Boulder, CO 80302.

Ortner, Frederick. "Senior Citizens Slide Lecture Program." Draft of research paper for Council on Museums and Education in the Visual Arts, March 1974. (13pp.) 28.A.55

Begun January 1973, a program was initiated to train senior citizens to present slide-lectures to other senior citizens about the collections at the Metropolitan Museum of Art. Training and recruitment of senior citizen volunteers, difficulties encountered, on-going training and funding are discussed. Most of the volunteers present monograph lectures on popular artists; some give subject matter talks. Plans include implementation of peer tours as well.

"Good Ideas from the Portland Art Museum." n.p., n.d. (2pp.) 28.A.56

A volunteer program in which volunteers were trained to be unpaid guards and evolved into information aides in the gallery. Contrary to initial fears, the paid guards do not resent the volunteers presence.

"Procedure for Becoming a Staff Assistant at the Art Institute of Chicago, The Junior Museum." n.p., n.d. (1pp.) 28.A.57

Terse statement of 6-steps necessary to become volunteer in gallery with no promises of acceptance of all applicants.

Fairfax County Park Authority. "Volunteers in Action." Annandale, VA: FCPA, n.d. (2pp.) 28.A.58

Three-fold recruitment brochure for volunteers naturalists and historians in county agency. Good use of resources in that volunteer opportunities in general are outlined as well as specific needs and benefits of these two types of volunteers. Includes return form requesting additional information. Good model.

Hoth, Sue Robinson. "The High Museum of Art, Volunteer Opportunities." Draft of research paper for Council on Museums and Education in the Visual Arts, 1975. (10pp.) 28.A.59

Report of museum that would continue to use volunteers regardless of its ability to hire professional staff. Director feels volunteer participation offers opportunity for development of financial backing and of visually-oriented community. Useful thoughts about the ripple effect of volunteerism.

Museum Education Committee, AAM. "Docent Forum." n.p., 5 April 1976. (15pp.) 28.A.60

Participants' folder for 3rd Annual Northern California Docent Forum on theme "How People Learn:" The Museum Experience and Learning Theory." Includes agenda, background information on panel speakers, a copy of Essentiasheet, a twice-yearly newspaper from Essentia Environmental Studies for Urban Youth, a curriculum development and implementation project funded by NSF. Forum provides nice model of regional cooperative effort.

Department of Health, Education and Welfare. "A Volunteer Development System, #76-10006." Washington, D.C.: DHEW, 1976. (2pp.) 28.A.61

One out of every 4 Americans over the age of 13 does some form of volunteer work during the year; 40% of those 40 million volunteers are men. Three-phase chart for volunteer development system; including preparation, operation and evaluation and future planning with responsibilities listed for the staff, executive, volunteer director, line staff and supervisors.

"University of Kansas, Museum of Natural History, High School Volunteer Program." n.p., 1976. (1pp.) 28.A.62

Begun in 1971, a cooperative program between the museum and a high school career education program in which high school volunteers (under museum supervision) prepare a presentation to elementary-age children. In addition, high school volunteers are encouraged to assist with Saturday morning workshops and field trips and evening activities. Article does not relate much more than this annotation.

"Virginia Museum Youth Guild." Co respondence from Mrs. Alfred Dohn to Mr. Bob Field, American Association of Youth Museums, June 1976. (2pp.) 28.A.63

Through the Virginia Museum Youth Guild, teenagers are invited to volunteer their time and talents to assist museum staff as requested. One area is as "Security Aides," whereby trained teens are assigned guard duty on Sundays when museum attendance is heaviest. Letter does not supply more information on this.

National Department of Education, National Zoological Park. "Zoovolunteer." Washington, D.C.:Smithsonian Institution, 1977. (5pp.) 28.A.64

Recruitment brochure offering something for everyone, including alternatives to teaching, nifty night animal behavior watches for those who want to volunteer but work days. One page devoted to each volunteer possibility with list of qualifications, time commitments, training and duties. Attractive model.

Ferdon, Edwin N. Jr. and Cappeluzo, Emma M. "A Double-Duty Docent Program." Museum News (March 1966). (5pp.) 28.A.65

Article co-authored by staff from Arizona State Museum and College of Education, University of Arizona, on cooperative project of those two institutions where university students from a course in Human Growth and Learning serve as museum guides. Good reporting on organization and mutual institutional responsibilities.

Write to Museum News, AAM, 1055 Thomas Jefferson Place, N.W., Suite 428, Washington, D.C. 20007.

Junior League of Dallas, Inc. "The Field Trip," Vol. 11, No. 1, March-April 1977. (12pp.) 28.A.66

Occasional newsletter prepared by Junior League members and mailed to teachers in Dallas County Metroplex relating current museum activities for school classes with short articles by classroom teachers on their classes' experiences with Dallas-area museums. A generous and useful gesture on the part of the Junior League volunteers.

"National Information Center on Volunteerism." n.p., n.d. (3pp.) 28.A.67

Brochure of private, non-profit organization that provides leadership training, program evaluation and research, new program models and an information and idea exchange.

For membership and workshop information, write to: P.O. Box 4179, Boulder, CO 60302. (303) 447-0492.

Prewitt, Diana and Rogers, Jewell. "Docent Task List." n.p., 1977. (4pp.) 28.A.68

Comprehensive and explicit list of volunteer possibilities at Brooks Memorial Art Gallery, Memphis, TN, including time involved each month; also very helpful 2 pages of public relations guidelines for information desk volunteer personnel.

Duff, James H. "An Untapped Resource." Museum News, (May 1972). (3pp.) 28.A.69

Recitation of the potentially valuable, but little-used teenage volunteers, ages 12-16 years old. Cites long-term program at Museum of Hudson Highland, NY in which junior and senior high school students perform tasks from custodial to exhibit preparation.

Straus, Ellen S. "Is It Time for Volunteers' Lib?" House and Garden, July 1972. (2pp.) 28.A.70

Straus agrues that volunteers' rights include: tax deductible benefits for in-kind service; reimbursement for transportation and other out-of-pocket expenses; written agreement butlining mutual responsibilities and benefits to agency and volunteer; have some dignity and rights as paid staff; have support of women's lib groups, and free day care center services.

Write directly to: Call for Action, Inc., 888 Seventh Ave., NY, NY 10019.

Bay, Ann. "Getting Decent Docents." Museum News (April 1974): 24-29. (5pp.) 28.A.71

Good survey of roles played by volunteer-docents in wide variety of museum settings.

Beach, Barbara K. Draft of research paper for Council for Museums and the Visual Arts. 2 October 1974. (6pp.) 28.A.72

At the Art Museum of the University of Texas, volunteer docents are seen as translaters, people who speak lay language to the public on its own terms. Beach reports on attitudes of the education department and training techniques to reinforce

"Docent Costume, Tullie Smith House Restoration." Atlanta: Tullie Smith House, 1974. (6pp.) 28.B.1

Fascinating narration of the efforts of the staff of an historic house in inland Georgia to accurately reproduce period dress for its docents with little original research material. Research for the project was conducted by fashion merchandising students at a community college; was received from Neiman-Marcus, Atlanta Historical Society and The Fashion Group, Inc., Atlanta Chapter. Two news articles on costume project and the house and crafts shop. (about 3pp. each.)

Bickel, Minnette, ed. "Docents Handbook, Tullie Smith House Restoration." Atlanta: Tullie Smith House, 1974. (40pp.) 28.B.2

Primarily content material on the house, architecture, occupants, furniture and related documents. Two pages on the "job of being a docent" present tour techniques.

Ross, Novelene. "Docent Handbook: Notes on the Roland P. Murdock Collection of American Art, Wichita Art Museum." n.p., n.d. (47pp.) 28.B.3

Survey of collection with specific questioning strategies suggested for each piece of art for school-age audiences and adults. Two study outlines for docents' classroom presentations using slides of paintings from museum. (See also 28.B.22.)

"A Guide's Guide: Wichita Falls Museum and Art Center." n.p., n.d. (36pp.) 28.B.4

Thoughtful, thoughtfilled, attractive volunteer's handbook covering docent council information, tips on giving tours, clues on sharing information in art, history or science halls. Each section is introduced with a whimsical and appropriate quote. For instance, before the Science section, "I can't understand it. I can't even understand the people who understand it." (Queen Juliana of the Netherlands on watching an electronics computer demonstration.) Good model.

Pitman-Gelles, Bonnie; Dunn, Mrs. Sterling; and Stewart, Jane. "Docent Programs Handbook." New Orleans: New Orleans Museum of Art, July 1974. (15pp.) 28.B.5

Succinct, business-like report of four varieties of docent participation, expectations of docents by the staff, opportunities for advanced training and suggestions for use of a volunteer's time in museum when not giving tours.

Department of Education, National Collection of Fine Arts. "Volunteer Guide." n.p., n.d. (31pp.) 28.B.6

Collection of sample tours (architecture of museum, painting, print, landscape) and a list of NCFA tour program objectives. Suggested tour handouts provide background information as well as specific questions to engage older student audience.

Davis, Meredith J. "Education Volunteer Training Manual." Chattanooga, TN: Hunter Museum of Art, July 1976. (50pp.) 28.B.7

Well-organized and comprehensive guidebook: covers the education department's philosophy, goals and objectives; description of programs designed to achieve those goals and objectives; communications techniques, which one for which objective; historical and contextual information on the permanent collection; and program descriptions of what teaching strategies for single and multi-visit school-museum programs.

Hoth, Sue Robinson and Voorhees, Virginia. "Docent Information Packet." Washington, D.C.: Corcoran Gallery of Art, 1971. (17pp.) 28.B.8

Neat, pleasing and inexpensive approach to sharing training information with volunteers.

"Handbook for Ringling Museum Volunteers." n.p., n.d. (10pp.) 28.B.9

Historical facts and general information on museum, with a dozen alternate areas for volunteer service.

"Cheekwood Mansion Guide Manual." n.p., 1973. (24pp.) 28.B.10

Handbook used as means of providing Cheekwood guides with logistical suggestions, data on house and grounds and institutional services.

Department of Education, Huntsville Museum of Art. "Docent Manual, 1976-1977." n.p., 1976. (31pp.) 28.B.11

Well-organized and thoughtfully put together. Manual presents usual information on docent role, requirements for membership in docent program, background facts, preservation of art objects. Manual's chief foci are suggestions for successful docenting (e.g. Be careful of other people's egos.); things to consider (Getting out of class to ride a bus on a field trip is more exciting than anything children may see at the museum.); clues and guidelines for volunteers participating in museum-school program to enrich social studies curriculum; glossary of art terms; suggested readings with space provided for notes; tour evaluation forms for teachers and docents. Offset printing method used and result is a manual with a more finished, professional appearance. 28.B.11 (cont.)

Department of Education, Museum of Fine Arts, Boston. Educational Aides Program: A Statement of Purpose." n.p., n.d. (11pp.) 28.B.12

Brief description of volunteer programs' components including gallery tours and in-school orientation and follow-up. Lengthy suggested reading list. By no means a complete or up-to-date picture of BMFA volunteer program.

Department of Public Education, The Metropolitan Museum of Art. "Education Volunteers Manual." n.p., 16 September 1975. (11pp.) 28.B.13

With the exception of those working with the Cloisters, Met education volunteers spend their first year at the Visitors' Center, providing the public with general information. Following that year, volunteers may join a committee of their own choice from the following: guides for introduction to galleries; Century II, a junior membership program; high school programs, weekend volunteers; tour guides for costume, Institute's study storage. About 150 volunteers in Public Education.

Reibel, Daniel B. and Reibel, Patricia B. "A Manual for Guides, Docents, Hostesses, and Volunteers of Old Economy." Ambridge, PA: Old Economy, Harmonie Associeates, Inc., Revised 1974. (76pp.) 28.B.14

Based on the premise that a poorly informed guide is chiefly the fault of the management, the Guide's Manual provides a great deal of data about the site, but in a very usable, helpful manner. Each building or station of the tour is presented with this information: 1) background historical data, 2) point to share if nothing else is possible; 3) interpretation provides cues to crowd flow and control at each station; 4) a sample dialogue; 5) items of interest with cultural history data. Presents docent/guide with two challenges: 1) to give a tour without once mentioning a single object, emphasizing why; 2) to have the visitor do as much talking as the docent. The introductory section is a particularly good model.

Pitman-Gelles, Bonnie. "Docent-in-Training Workshop Notes." New Orleans: New Orleans Museum of Art, 1975. (85pp.) 28.B.15

Series of agendas with art activities as part of docents' workshops used in accompaniment with Watermelon, a training notebook with emphasis on sensory activities (33.3 and available from N.O.M.A.) Plus some problem-solving situations like: What can be done with a late docent?

Department of Education, Charlotte Museum of History. "Docent Handbook." n.p., ca. 1976. (120pp.) 28.B.16

Handbook provides family biographies, inventories, and documents, with copies of full-length resource articles on regional furniture styles, special interest bibliographies with sections on Volunteer-Museum Contact and docents assistance with security. In preparing the manual, the staff apparently consulted other docent handbooks, acknowledging sections taken in part from other sources.

Division of History, Fairfax County Park Authority. "Sully Plantation and Colvin Run Mill--Docent Training Manual." n.p., 1976. (264pp.) 28.B.17

Two historic sites within single county agency share docent training. Single handbook for both sites reduces duplication of efforts in training and written materials on interpretation techniques, some historical background data, security and safety procedures and docent-site expectations.

Lowery, Lawrence T. "A Personal Training Program for Docents." Oakland, CA: The Oakland Museum Association, Fall 1976. (48pp.) 28.B.18

Workbook directs each docent to think about his/her own goals regarding the museum, the interdependence of the museum, visitor and docent, suggestions and examples of how to structure a presentation questioning and response strategies. Carefully structured interpretation. Points out mutual benefits of volunteer service to museum and individual. Workbook prepared through cooperative teacher preparation project at University of California.

Write directly to The Oakland Museum Association, 1000 Oak Drive, Oakland, CA 94607.

Department of Education, Houston Zoological Gardens. Docent Training Manual Fundamentals. n.p., 1975. (53pp.) 28.B.19

This manual contains general information on taxonomy, vertebrate classes and ecological concepts and so can be used in docent-training programs for any science-related museum. An accompanying volume, the Docent Training Manual: Houston Zoo Supplement (See 28.B.20.) deals specifically with the Houston Zoo, its staff and collection. Within Fundamentals, particularly helpful features for docents or authors of other manuals are "questions most commonly asked" about certain animals, a bibliography for a variety of audiences, glossary, a short and general list of resources for information on environmental education and a list of techniques for raising baby animals. Concepts presented are very simplified and Fundamentals should be used in conjunction with more in-depth training. (Annotated by Sally Chabot.) 28.B.19

Department of Education, The Houston Zoological Gardens. "Docent Training Manual, Houston Zoo Supplement." n.p., n.d. (56pp.) 28.B.20

Detailed presentation of zoo collection, its unique physical characteristics and native habits. Two pages on "Tour Helpful Hints: and two more pages on interesting, little known facts to share with visitors. Standard manual is chiefly concerned with facts on the collection. Spiral binding makes for a finished effect.

Meyer, Barbara. "Tyler Museum of Art, Docent Handbook." Tyler, TX: TMA, Summer 1972. (20pp.) 28.B.21

A first-rate docent handbook with emphasis on sensitizing docents to their environment and encouraging them to value their own impressions. Good organizational tips and straightforward statement of museum's expectations of docents. Looseleaf format allows addition of each docent's own clippings, journal entries, class notes, random thoughts, as well as information sheets on new exhibits. Format encourages idea of docentwork as continual learning process. Good model for content and format.

Ross, Novelene. "Docent Handbook, Wichita Art Museum." n.p., ca. 1977. (75pp.) 28.B.22

The bulk of this very readable handbook is devoted to a well-organized historical presentation of different media represented in the collection, some sections credited to other museum staffers. The last section deals with tour goals and techniques and offers model presentations for use with specific art works using inquiry, comparison and games. Includes some sensible hints for use on tour with suggestions for presentation for grade level.

Franklin, Deborah and Mayer, Susan. "Docent Manual." Austin, TX: The Art Museum, University of Texas, Revised 1974. (61pp.) 28.B.23

Comprehensive manual including a discussion of the philosophical basis for museum education in art museums, a history of the volunteer program, at the University Museum and volunteer programs across the U.S., docent standards, clues on how to plan and conduct a tour with emphasis on the docent's innate, sometimes latent talent; the need for enthusiasm, sincerity and self-evaluation; a guide for self-evaluation; suggestions for working with children; tour logistics and annotated bibliography. Staff's respect for its volunteers is apparent throughout this excellent manual.

"A Volunteer Guide Program at the Harvard University Museum." n.p., ca, 1976. (3pp.) 28.B.24

Brief report on a 1976 pilot program in which 20 volunteers developed and presented tours for four museums comprising the Harvard's University Museum. One component of a larger effort to develop the museum as an educational resource.

"Shedd Volunteers '75-76." n.p., n.d. (28pp.) 28.B.25

Handbook of basic information about John G. Shedd Aquarium, Chicago, with floorplan, historical data on the aquarium, roster of docents and aquarium organizational chart. Two pages of commonly asked questions with answers. Good model for inexpensive starting point.

"Hirshhorn Museum and Sculpture Garden, Docent Staff Questionnaire." n.p., n.d. (2pp.) 28.B.26

Questionnaire to determine docents' special interests and capabilities; used later to schedule workshops and tours that reflect and accommodate skills and needs. Sample question to docent: It is easiest for me to answer questions for early elementary grades 3-6, jr. high, high school, family groups, adults.

"Course Outline for First Year Docents." n.p., n.d. (4pp.) 28.B.27

Brief outline of docent training at De Cordova Museum, Lincoln, MA. Includes lecture topics demonstrations and dates, field trip schedule and reading list.

McGray, Karla and Hall, Nancy-Johnson. "How to Make A Museum Volunteer Out of Anyone." *Volunteer Administration*, Vol. X, No. 3 (Fall 1977): 31-33. (3pp.) 28.B.28

In an effort to involve the community at the maximum level, the Science Museum of Minnesota has hired a Coordinator of Human Resources and is looking for ways to involve any member of the community in the SMM's programs, dispelling the stereotype of a museum volunteer. 28.B.28 (cont.)

Volunteer Administration publishes articles dealing with practical concerns, philosophical issues and significant and applicable research in the area of volunteers. Information procedures for submitting articles may be obtained from Editor-in-Chief, Mrs. Marlene Wilson, 279 S. Cedar Brook Road, Boulder, CO 80302. Published quarterly by Association of Voluntary Action Scholars, (AVAS), the Association for the Administration of Volunteer Services (AAVS), and the Association of Volunteer Bureaus, (AVB). Inquiries on subscriptions should be directed to Volunteer Administration, Box G-55, Boston College, Chestnut Hill, MA 02167. (Fall '77 issue, 37pp.)

Grunberg, Stephanie. "Daughters of American Revolution Museum, Docentry Game." Washington, D.C.: DAR Museum, 1977. (2pp., 1 photograph.) 28.B.29

Modelled after "Monopoly," "Docentry" is designed specifically with the DAR Museum's collection in mind and intended to be an on-going training tool available to docents in off-duty time in the Docent Lounge. The gameboard spaces are labeled with Museum Period Rooms in lieu of real estate names. Sample copy includes: "Tennessee Room, you updated your interpretation, move ahead 2 spaces;" "Fire drill and you are with a group of 50 and panic, return to start." Two decks of activity cards labeled "Tours" and "Troubles" presenting problem-solving situations with other players serving as judges of the responses. The first player to reach Finish is named the winner, although as Grunberg, former Curator of Education, points out, there are no losers in "Docentry."

"To Do for Docent Training." n.p., 1975. (4pp.) 28.B.30

Staff notes listing what needs to be done to prepare for docent training. A sensible approach, laying out tasks to complete, those completed and quantities of copies needed. Not something you need to write away for, but an organized approach you might want to consider.

"IMA Docent Programs." n.p., n.d. (6pp.) 28.B.31

Requirements, commitments, responsibilities and benefits for docents at the Indianapolis Museum of Art. Includes organizational chart showing where docents fit in larger operation.

Department of Education, Los Angeles County Museum of Art. "Docent Handbook." n.p., September 1973. (47pp.) 28.B.32

Covers general information issues like security, museum's dress code for docents, docent courtesy in following tours by peers, evaluation, 15 museum rules and a general history of the museum; tips on preparing tour for grades 5-12 including selection of objects, writing a script, review and evaluation of script, conducting the tour and evaluation of docent's own effectiveness; hints on successful tour techniques with clues to questioning strategies, transitions, discipline, speech and advice from experienced docents. Similar kinds of information presented for adult tours; tips on preparing a fact sheet, required research paper with headings subjects, style and technique, artist and bibliography and several pages of information about using the museum's art research library. Includes Docent Council By-laws. Comprehensive, with specific and useful tour tips.

Department of Education, Corcoran Gallery of Art. "Docent Handbook, 1973-74." n.p., 1973-1974. (36pp.) 28.B.33

Lays out brief job descriptions of volunteers and paid staff; lists museum and galleries with addresses and phone numbers to encourage looking and comparing. Section on responsibilities is written in a straightforward style, but warmly, helpfully and in a non-threatening manner. Suggested supervision techniques of schoolchildren in gallery shop. This handbook includes tour guidelines and tips on maintaining group order, presenting nude works of art, bibliography on contemporary art and notes on the permanent collection.

"Guidelines." n.p., n.d. (6pp. reduced.) 28.B.34

From the Baltimore Museum of Art, Baltimore, MD, this docent newsletter is poster-size (22" x 30") and includes notes of interest to docents, like current shows and exhibits, names of new docents, notes on artists, tour tips and reading suggestions. Catchy format and one certainly couldn't overlook its arrival in the mail.

Department of Education, Nelson Gallery of Art. "Docent Handbook." Kansas City, MO: NGA, 1975. (168pp.) 28.B.35

Cumulative compilation of good model scripts for children's tours of gallery with instructions for docent to rearrange, supplement or delete information as desired. Each section (arranged by galleries) preceded by sample teacher's tour request form and resume of tour for teacher's information. Reminds docent what information teacher has received and what he/she expects. Sheet of practical questions often asked by children with suggested responses.

Department of Education, Daughters of American Revolution Museum. "D.A.R. Docent Notes." n.p., n.d. (3pp.) 28.B.36

Responsibilities of docents. Also a checklist of questions to ask before a tour (How much time do you have?) and questions to ask after a tour (Is there anything on the tour I'd like to find out more about?)

Rice, Danielle. "Report on the Volunteer Program at the Yale Center for British Art." n.p., July 1977. (7pp.) 28.B.37

Review of docent training session topics, looking assignment at Frick Museum during day trip to NYC, factual outline for general tour and recommendations to education staff for training sessions to accomodate different needs, size of volunteer force and criteria.

New and small (1-1/2 staff) education department with interest in adding graduate students to volunteer staff. This observation report was prepared by graduate student at Yale in art history. Good use of available people resources.

Yelen, Alice Rae. "The Yellow Pages." New Orleans, LA: New Orleans Museum of Art, September 1976. (24pp.) 28.B.38

Well-organized, outlined presentation of docent's commitment, first and second year gallery activity options, on-going training and responsibilities for a docent's museum day of service. Museum manners, docent aids (stools, smocks, lounge and lockers). Succinct, helpful listing of tour tips and techniques. Good, inexpensive, model handbook.

Pitman-Gelles, Bonnie; Davis, Ruth; Radke, Ayleen; Stewart, Jane. Miscellaneous collection of docent-related handouts. New Orleans, LA: New Orleans Museum of Art, ca. 1975. 28.B.39

-- "Guidelines for Tour Evaluation." Form for docent's self-evaluation; asks docent to look for attitudinal change of groups. (1p.)
-- "Creative Examination of an Inanimate Object." Docent training activity in which docents spend an intimate 1 hour with an object of his/her choice with attention directed toward developing strategies to use to involve visitors with objects on tour. (3pp.)
-- "The Head Docent, Her Role and Mine." On a rotating basis each docent serves as Head Docent, responsible for the day's activities. Sheet offers docents chance to assess and comment on this position. (2pp.)

-- "Docent Evaluation of African Museum Experience." Valuative evaluation from docent's point of view. 28.B.39 (cont.)
-- Questions and answers about NOMA, Education Department, Docent Program. (3pp.)

Department of Education, Corpus Christi Museum. "Docent Information Sheets." n.p., ca. 1968. (16pp.) (Mimeographed.) 28.B.40

Eight presentations of information on a variety of plants, birds and marine life. Probably not as useful to a docent as 28.B.41 in which author is specific as to concepts to be introduced in addition to content information. (Each about 2pp.)

"Docent Background Material, Ice Age Hall." n.p., n.d. (4pp.) 28.B.41

Information on ice age hall exhibits presented for docent use--major concepts to be presented, problems to be discussed at each station and factual background material. Lucid, concise, information presented in usable form for docents.

Department of Education, The Children's Museum of Indianapolis. "Docent Information Booklets." Indianapolis, IN: CM, n.d. (See each entry.) 28.B.42

Resource books for docents with content, background information only. Lengthy texts that emphasize facts available for each section of museum.
-- "General Museum Information." Gilbert Leon Taylor. Covers security and emergency measures, docent duties and responsibilities, sites to visit in and around Indianapolis, places to eat within 10 minutes of museum, building rules and regulations. (35pp.)
-- "Americana." No author. Content material on early American processes (e.g. dyeing, weaving), early Indians and territorial history, special features of the museum's Americana gallery, each section has footnotes and bibliography. (79pp.)
-- "Story of Our Earth." N. Gary Lane. Geological and paleobotanical, etc., data presented for those docents touring groups in related halls. Docent resource information plus exhibit script. (108pp.)
-- "Natural Science." Eric D. Gyllenhaal. Docent resource information and exhibit script. Related technical content data plus bibliographies for each chapter. Includes section on how specific cave exhibit was constructed. With attention to discovery desk, participatory and sensory. (100pp.)
-- "Reuben Wells Locomotive." Gilbert Leon Taylor. Blacksmithing, train stations, railroad signaling, etc., and the effects of railroading on America, Indiana. Includes script of exhibit. (69pp.)

Ari, Donna Barnard. Docent Handbook, The Corcoran Gallery of Art. 28.B.48
Washington, D.C.: CGA, September 1977. (94 pp.)

Handsome spital-bound handbook of docent materials developed at Corcoran Gallery of Art since 1972. Arranged by gallery (history, governance and support groups, departments and functions); organization and responsibilities (docent programs, docent responsibilities and evaluation, applications and docent-related forms); tour resources (tour guidelines and tips, tour format, problems, tour activities, notes on silkscreening as one activity and guidelines for architectural tour of museum; research and reading suggestions. An excellent model.

Order directly from Corcoran Gallery of Art, 17th Street and New York Avenue, N.W., Washington, D.C. 20006. Cost: $5.00 prepaid.

-- "Firefighting." Gilbert Leon Taylor. Background data and script for museum's firefighter gallery. (54pp.) 28.B.42 (cont.)

-- "Ancient Egypt." Linda Anderson Black. Background information an exhibit script on Egypt. (62pp.)

-- "Emergence of Man." Linda Arderson Black. Background information and exhibit script on early man.

Fripp, Gayle. "Greensboro Historical Museum--Docent Guidebook." n.p., n.d. (95pp.) 28.B.43

Helpful tips on interpretation including attention to pronouns ("you" is most personal; "it" is least personal.) Copies of materials sent to schools so docents are aware of teacher expectations. Includes proposed exhibits schedule for 3 years. A lot of content materials. Prepared with 3 holes at left margin, encouraging docent to update handbook and use as permanent reference source.

Astone, Judy. "Docent Roundtable, Natural History Museum of Los Angeles." n.p., n.d. (5pp.) 28.B.44

Information sheets on recruitment techniques, application and notes from docent league meeting 27 February 1978. Interesting to see what's discussed, but not vital unless you are at a loss as to what might transpire at a docent meeting.

Department of Education, Ft. Worth Museum of Science and History. "Docent Handbook, 1973-74." n.p., n.d. (5pp.) 28.B.45

Presentation of institutional expectations, training and encouragement for those anxious about successful tours with schoolchildren. Tone of handbook is low key, helpful and encouraging.

Welch, Nancy. "Docent Wrap-Up Meeting: Some Feelings in Retrospect." n.p., ca. 1974. (2pp.) 28.B.46

Perceptive notes of student intern on general sharing/information session with NCFA docents. Includes useful clues giving secondary tours.

Department of Education, Arizona-Sonora Desert Museum. Miscellaneous Docent Materials. n.p, 1977. 28.B.47

-- "Handbook." Description of docent council. Large, readable type. Well edited. A whole lot of information squeezed into a manageable handbook, 8 1/2" x 5 1/2". Easily handled, inexpensive to replicate. (21pp.)

The Oakland Museum Docent Council. "Standing Rules and Bylaws." n.p., April 1976. (16pp.) 28.C.1

Very businesslike recitation of purpose, membership requirements, docent training and recruitment responsibilities of the Council, with bylaws, supervision and evaluation of docents. Appears to touch all bases.

Franklin, Deborah and Mayer, Susan. "Docent Standards and Roster." Austin, TX: University of Texas Art Museum, n.d. (20pp.) (Mimeographed.) 28.C.2

Straightforward set of requirements for docents in highly organized docent force. Very helpful section on considerations when docent is designing the tour, including techniques, presentation, preparation and evaluation. One of our better offerings on this subject.

Los Angeles County Museum of Art. "Museum Service Council." n.p., 1975. (5pp.) 28.C.3

The Museum Service Council is one of nine volunteer councils supporting the L.A. County Museum of Art. Of these nine councils, two are direct service organizations, the Docent Council and the Museum Service Council. Paper outlines activities of volunteers, training, recruitment and responsibilities, and organizational chart.

Selby, Roger and Docents of Wadsworth Atheneum. "Bylaws for Volunteer and Affiliated Organizations." n.p., 1973. (6pp.) 28.C.4

Fairly strict guidelines, but Selby felt the relations between the docents and his department would be clearer and more stable because of the document.

Charlotte Nature Museum. "1973-74 Guild Yearbook." Charlotte, N.C.: Charlotte Nature Museum, 1973-74. (28pp.) 28.C.5

Spiral bound booklet recounts Guild activities and committee duties, includes docent roster and Guild constitution.

Sibley, Gretchen. "Docent League of Southern California." n.p., 1973. (5pp.) 28.C.6

Results of 1973 questionnaire survey of 375 institutions; 32% returned a completed questionnaire. Survey considered types of work performed by volunteers, means of recognition of volunteers, length of training, personnel involved and kinds of docent organizations. Also a brief description of Docent League group which meets about 3 times a year, with 2-3 representatives from each participating docent organization. Purpose is to exchange ideas and discuss problems.

CONSIDER THIS...

A Guide to Sharing Information on Museum Education Programs

At the Annual Meeting of the American Association of Museums in Seattle many museum educators asked us "How do we put information into the Center's collections? Do you have a system? What do other people want to know most about my programs?" We at the Center have hesitated to draft a form for gathering information, knowing how busy you are and how long it takes to fill out yet another questionnaire. Yet, these questions, repeated at other meetings and in our mail, indicate that we have come to the point of needing a system. We recognize, because of the kinds of inquiries we receive and the need here at the Center for more depth in our cross-indexing, that we could use more specific and more standardized information on your programs and services. In addition, having a broader range of information about your work allows us to use you and your museum as a resource for more than one type of assistance: if, for instance, you have developed for a new audience an interesting program that required considerable retraining of your staff, you might be a resource for questions about in-service training as well as for questions related to working with the specific audience.

We ask that you consider this questionnaire a pilot project, and let us know if you think any part of it is inadequate, overly difficult, or irrelevant to your work. It is not meant to elicit information that you consider confidential, and we would like to encourage you NOT to answer any questions that you do not have information about, or would not wish to have circulated. Such omissions will, in themselves, help us to revise these guidelines.

Please DO continue to send brochures, self-guides, teacher materials and other documentation, as you have been so generous in doing. We hope that you will have some time to devote to the process of enriching this information through using these guidelines, but we want to assure you that anything you have to share with your colleagues in museum education will be a valuable addition to our collections.

One copy of the guidelines, which we call "Consider this...," follows this introduction. Please photocopy as many copies as you wish, and report, as you find time, on as many programs as you wish to share with the profession.

(Be as brief, or as detailed, as you wish. Please don't answer any question you feel is inappropriate. If you like, star (*) any question that you find unclear, or not helpful.)

Name of Institution:
Address of Institution:

Name of Department offering the service or program described below:

Name and title of person supervising this service/program:

Name and title of person filling out this form (if different from above):

Name of the service/program described:

Goal of the service/program:

Brief description of the service/program:

PLANNING THE PROGRAM

Why THIS program?

1. Why was this service/program developed? (Did you have special resources available to your department that prompted the development of such a program... or a part of the collections that you wanted to focus on...or did you identify a special need in your community, etc.?)

2. Is the program based on any other program or model that your institution has done, or that you have seen elsewhere? Please describe this model briefly.

PLANNING THE PROGRAM cont.

What was involved in the planning?

3. What resources did you use? List both materials and people who served as resources.

4. How much time did you spend in planning the program?

   Was this time adequate?

5. Please list the significant events of the planning program (those things that you think someone else would need to know to prepare a similar program.)

STRUCTURE

6. Is this a new or pilot program?
   Is this an ongoing program?
   For how long has the program been offered?

7. When and where does the program take place?

8. Is transportation arranged as part of the program?
   If so, between what sites?
   By what agency is the transportation arranged?

9. What agency or agencies are involved in the running of the program?

10. What agency (if not your museum) is the sponsor or umbrella agency of the program?

11. What events or people are crucial to the successful running of the program?

12. What parts of the museum collection do you use for this program?

STRUCTURE cont.

13. What teaching methodology do you use? (For example, inquiry, lecture, a combination of techniques, etc.)

14. What materials do you use? (AV, video, self-guides, teacher handbooks, etc.)

Are these materials available from you to other museum educators who might want copies?
Is there a fee for these materials?
Were these materials prepared in the museum, or by an outside agency?

If the latter, what agency?

STAFF

15. Which members of the museum staff are involved in the ongoing activities of the program?

16. Are there people working in the program who are on the staff of other institutions?

If so, what institutions, and what staff positions?

17. Do you use volunteers in the program?
If so, are all the volunteers recruited by the museum?
If recruited by some other agency, please specify.

COSTS

18. If possible, please give the total cost of the program. (If you prefer, give an average cost per week, month, or year. Please indicate time period.)

Does this money come from: (please check one or more)

a. Departmental budget.( )
b. Direct allocation from the institution's budget. ( )
c. Grant. ( ) From what agency?

d. User fees.( ) How much per user? (Or per group?)

e. Other source.( ) Please specify source.

19. How many salaried people on the museum staff are involved in providing this service?

COSTS cont.

Approximately how much time do they spend on the program? (Use a weekly, monthly or yearly figure, as you prefer. Please specify time period.)

Is the cost of staff time reflected in the total cost given above?

20. Does the program use outside consultants or contract workers paid by the museum? If so, please list.

Is the cost of outside consultants reflected in the total cost given above?

21. How many volunteers are involved in the program?

How much time does each volunteer give per week? (Or per month?)

22. Was special training needed for this project?
Who provided training?

Who was trained?

How much time was involved in training?

Describe briefly any elements of training that you feel would be important for others to know about.

AUDIENCE

23. Who is the audience for this program? (Adolescents, 6th graders, membership of institution, off-the-street visitors, etc. Please be specific.)

24. What characteristics of this audience does your program appeal to?

25. Is this a new audience for you?
Is this a new service for an existing audience?
Does this program replace, or supplement, other offerings to this audience?

26. How many people is the program intended to serve at one time? (Single visitors, school class of___members, group of___people, etc.)

AUDIENCE cont.

27. Are there particular needs of this audience that you feel other museum educators should be aware of? (inability to stand for long periods, inability to see or to read, difficult behavior, etc.)

    What kinds of devices or conveniences have you used to meet these audience needs?

EVALUATION

28. Have you done any formal or informal evaluation of the program? Who served as the evaluator?

    Briefly describe the evaluation process.

29. What changes have you made in the program as a result of the evaluation?

30. Can you include a copy of the evaluation for the Center's files?

HINDSIGHT

31. If you could do this program all over again, what changes would you make? (Chose any of the following that you wish to answer, and include a brief explanation. You may want to use a separate sheet of paper.)

    Would you:
        Use the same basic program for a different audience?
        Use more, less, or different staff members?
        Use more, less, or different outside consultants?
        Use different materials in the program?
        Alter the time/components/events of the training program?
        Alter the time/components/events of the program itself?
    Other:

FUTURE

32. Do you expect this program to continue for some time? How long?

33. Do you expect to change elements of the program to insure its continuation? How would you suggest it be changed?

WHAT HAVE WE MISSED?

34. Are there aspects of your program that this outline fails to address? What are they?